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**RISE – Resilience and Innovation through Strengthened Entrepreneurship**

Grant Agreement <UfM/2020 Grants-001>

**Terms of Reference (ToR)**

**for**

**Final External Evaluation of the Project**

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BACKGROUND

## The project

## Project summary

DURATION: 12 months, from 17 July 2021 to 30 June 2022

COUNTRIES: Morocco, Tunisia and Italy

PARTNERS: Oxfam Morocco, TCSE - Tunisian Center of social Entrepreneurship, ENACTUS Morocco, Fondazione un Raggio di Luce

GRANT RECIPIENT: Oxfam Italy (OIT). It is responsible for the overall coordination of the project and its financial and technical implementation. OIT ensures that tasks implemented by different partners are well coordinated and in line with the approved work plan and budget. Each partner organization is responsible to the grant recipient for the proper financial accounting of the expenditures associated with activities, while Oxfam Italia is ultimately responsible and accountable to UfM for ensuring that grant resources are used in accordance with the provisions of the financial agreement and fully accounted for.

UfM’S ROLE: UfM funded RISE project with a grant of 287.966,00 euro for a total project budget of 359.957,49 euro.

## Intervention logic

**Goal.** The main goal of the project is to contributing to increase economic resilience and employment opportunities for vulnerable groups in Morocco and Tunisia in response to the socio-economic challenges exacerbated by the on-going COVID-19 pandemic.

**Objectives.** Unleash the potential of innovative entrepreneurial activities and improve institutional, technical, social and economic conditions in Morocco and Tunisia for inclusive growth and job creation.

**Project components.**

**1. Research and Analysis:** SEs’, SESOs’ and MSMEs’ capacity building needs and key economic sectors are identified and analyzed in Morocco and Tunisia.

**Capacity Building and Networking:** Innovative and tailored capacity building activities as well as networking opportunities are provided to Moroccan and Tunisian Social Entrepreneurship Support Organizations, Entrepreneurs and young aspiring entrepreneurs.

**Learning and Dissemination:** Best practices on supporting mechanisms for social entrepreneurs and MSMEs facing economic and health

## Organizational structure

The implementation of the project is leaded by a Regional Coordinator based in Italy.

A Project Management Unit (PMU - inclusive of one member from each partners) has been set up in order to: i) plan the activities to implement the project, ii) enhance and strengthen the role of the beneficiaries, iii) guarantee a shared, effective and collective participation to the decision making process, iv) set up and implement a sound joint monitoring system, v) ensure a sound technical and financial management of all project components.

## Beneficiaries

Target group(s):

1) 30 existing social enterprises and MSMEs (estimated 120 young men and women employed), particular attention will be given to enterprises that are women and/or youth-led or which create jobs for young people and women especially in rural areas;

2) 40 SESOs - estimated 200 technical staff - working closely with enterprises and willing to improve the quality of their services through innovation and adaptation;

3) 100 young aspiring entrepreneurs will be supported in accessing the labour market.

Final beneficiaries:

est. 8.000 youth, women and their households; media and influencing institutions; governmental bodies and main donors; educational institutions, private companies and investors and financial institutions.

*(For details please refer Annex 1: RISE project’s Logical Framework)*

## Project activities

In order to understand the rationale, and assess the feasibility of proposed outputs along with the ability of the implementing partner to propose reliable solutions and undertake corrective actions in due time, it is important to list the project activities:

**Related to Op1**: A 1.1. – Carry-out national gendered needs assessments of local economy actors facing the COVID-19 crisis in Morocco and Tunisia; A 1.2. – Conduct national analyses to identify the main economic sectors with potential in terms of employment for women, youth and vulnerable groups.

**Related to Op2**: A.2.1 – Provide tailored digital and in-presence technical support and trainings to Moroccan and Tunisian SESOs, SEs and young entrepreneurs; A.2.2 - Promote networking activities between social entrepreneurship actors, employers and employment agencies; A.2.3 – Organize internships for young entrepreneurs in well-established national companies in Morocco and Tunisia; A.2.4 - Organize 1 virtual study visit in Italy on effective supporting mechanisms for MSMEs and SEs facing the covid-19 related challenges.

**Related to Op3**: A. 3.1 – Collect and disseminate good practices of successful MSMEs and SEs overcoming the economic and health crisis at national and international levels; A.3.2 Produce documentaries showing the problems faced by youth in accessing the labor market.

# FINAL EVALUATION

RISE project is approaching now the last months of the activities and the closure of the project activities. For this reason, there is the need to undertake a comprehensive evaluation exercise to analyse the project’s performance by looking at practices and ways of working in each country of implementation. The final external evaluation is intended to assess whether targets and results have been achieved within the project timeframe and to get useful learnings from the implementation of the project. For this purpose, Oxfam Italia is looking for a consultant/s or consultative firm or a research centre (henceforth provider) with relevant experience in conducting assessment exercises of the effective use of the capacity building for MSMEs, SEs, SESOs ad aspiring entrepreneurs to overcome the Covid19’s economic and health crisis.

## Purpose

The RISE final external evaluation aims at assessing the a) Relevance, b) Coherence, c) Effectiveness, d) Efficiency e) Sustainability of the project against its overall objective and the main outcomes, consistently with OECD-DAC evaluation criteria. It will also asses the scalability of the project. Therefore, the present final external evaluation has the purpose to assess the quality of the implementation of the project and to highlight key learnings coming from project where the SEs, SESOs and Aspiring Entrepreneurs had benefit from a specific capacity building and technical support program with the ultimate goal become resilient to the challenges caused by the covid19 and promoting youth and women employment in the target countries. Overall the scope is to assess the support and guidance provided during implementation, performance of grant recipient and implementation partners in the delivery of the grant and the attendant results and contexts in which they occurred.

The evaluation purpose is focused on both accountability and learning. Therefore, the main evaluation questions are the following:

1. Relevance.

Assessing relevance means understand if the intervention objectives and design respond to beneficiaries’, regional, country, and partner/institution needs, policies, and priorities, and continue to do so if circumstances change. Questions to consider are: Has the conceptual framework, vision, purpose of the grant initiative been validated by the activities implemented so far? Were the objectives and design of the project relevant given the political, economic, and financial context?

1. Coherence.

Assessing coherence means analyse the compatibility of the project with other interventions in a country, sector or institution. Questions to consider are: To which extent other interventions support the project? How innovative and strategic is the project in comparison with similar initiatives internationally? Are there any reflected good practice and does it remain relevant in the face of evolving similar concepts and approaches at national, regional and international levels?

1. Effectiveness.

Assessing effectiveness implies measuring if the project achieved, or is expected to achieve, its objectives and results, including any different results across groups. Questions to consider are: To which extent intended outcomes of the project has been able to achieve? Any unintended outcomes? Has RISE reached the expected number of beneficiaries? Are the beneficiaries satisfied with the quality and delivery of services? What were the major factors influencing the achievement or non-achievement of objectives? What the beneficiaries learnt from the project implementation?

1. Efficiency.

Assessing efficiency means measuring if the project delivers, or is likely to deliver, results in an economic and timely way. The focus of this assessment should be on cost-benefit analysis. Questions to consider are: What were cost-benefit of the delivery of project activities? Were the Consortium efficient in the delivery of the activities in the project? Was the use of grant funds adequate to deliver the project activities and measure the involvement of the target groups in RISE?

1. Sustainability.

Assessing sustainability means measuring if net benefits of the intervention continue, or are likely to continue. In includes an examination of the financial, economic, social and institutional capacities of the project to sustain net benefits, over the time. Questions to consider are: To what extent the benefits of a project continue after donor funding ceased? How have the Moroccan and Tunisian target groups become resilient to the Covid19 challenges? How are the perspectives and priorities of women and young people addressed across all the project activities?

1. Scalability.

Assessing scalability means understanding the key elements that could, in the future, bring the project to scale. Is there evidence that the project is likely to grow – scaling up and out – beyond the project life? Which are the possible scalable elements? What would be the relevant area and beneficiaries? Who would be the potential partners? What would be the magnitude of investment to make scalability or replication possible?

1. Impact.

Assessing impact means understanding the significant changes have occurred in the beneficiaries’ lives. Questions to consider are: To what extent the project has generated intended and unintended effects in terms of achieving social and economic inclusion throughout the support to SEs, SESOs and Aspiring Entrepreneurs? What has been the effect and value of the activities to support the SEs, SESOs and Aspiring Entrepreneurs in overcome the challenges caused by the Covid19 economic and health crisis? Is there any specific positive or negative gender impact generated throughout the project?

## Objectives

1. Identify, assess and document the evidence for the achievement of expected and unexpected results of the project towards the intended outcomes following the strategy of intervention in the targeted areas.
2. Assess the relevance, coherence, effectiveness, efficiency, and sustainability of the project related to contribution to partnerships, accountability, value for money from the perspectives of different stakeholders, capacity to generate long-term impact and development processes that continue after the project duration. This can include the appropriateness and relevance of the beneficiary selection.
3. Identify key learnings, good practices, areas to be strengthened and provide recommendations to create a more solid basis for evidence-based approach to supporting diaspora investment. Therefore, the evaluation has to determine the reason why certain changes occurred or not, synthetize what worked and not work and why, draw lessons, derive good practices and pointers for learning.
4. Assess whether the management and governance structure of the project was fully functional to reach the project’s objectives.
5. Assess the existing strategies for sustaining the project’s results and recommend measures for new similar project. This can be linked with the governance structure, decision making process, project implementation modality, etc.
6. Identify external environment challenges and opportunities that had impacted on the project progress.
7. Advise about possible and applicable measures and decisions that could have increased the project’s capacity to facilitate the Italian diaspora role of investors to promote youth employment in rural areas of the origin countries.
8. Make recommendation of any knowledge products which can be prepared arising from the findings and conclusions of the evaluation.

The evaluation findings and recommendations will be used as a basis for well-grounded strategic reflection both by UfM and Oxfam Italy for future support and involvement with similar initiatives.

## Geographical area

The project is implemented in Morocco and Tunisia. The evaluation has to cover the work done in Morocco, Tunisia and Italy.

The final external evaluation will be done by combining work on remote and field missions in Morocco and Tunisia. The field-visits will have the purpose of collecting field data from partners, stakeholders and beneficiaries. Per each country of implementation, a stakeholder’s map will be made available to the selected consulting firm. The proposal must describe how to collect data from beneficiaries and local partners if field missions are not possible.

*(Refer Annex 2: List of the partner for each country)*

## Evaluation approach and methodology

To select the provider in charge of conducting the final external evaluation, Oxfam Italia expects to receive clear technical and financial proposals clarifying the following:

## Approach

1. Evaluation will employ both qualitative and quantitative methods for data collection supported by an extensive review of secondary information on issues that are relevant to the project (i.e. Tunisian and Moroccan Social Enterprises, Social Enterprises Support Organizations and Aspiring Entrepreneurs, SEs and SESOs’ capacity and willingness to overcome the challenges caused by the Covid19, among others).
2. Evaluation will be conducted using semi-structured questionnaire/s (SSQ), Key Informant Interviews (KIIs), Focus Group Discussions (FGDs). All the mentioned research tools must be gender sensitive. Per each data-collection methodology, the provider must develop specific questionnaire/guidelines that will be made available as annexes in the final report. The information so gathered will be triangulated to obtain a more accurate picture.
3. The data collected on the ground, should show segregation of beneficiaries by gender and age, and it has to be carried out in Tunisia and Morocco as described under section 5. The proposal has to illustrate the methodology of collecting field data from partners and and beneficiaries.
4. In conducting the Evaluation, the provider must be in constant coordination with the RISE teams. As part of the technical proposal submitted, the Provider should propose a plan to make sure the necessary coordination will be ensured.
5. Outline Oxfam’s focus on gender and inclusion with a specific focus on what this means in the context of this evaluation’s focus. In line with Oxfam’s values and organizational ambition, the evaluation should seek to prioritize a focus on gender and inclusion and trying to understand the extent to which the project or program applied gender-sensitive and inclusive approaches and explicitly aimed for results that improve the rights of all groups and that contribute to gender justice.
6. The evaluation will adopt a context-specific approach in order to better capture and delineate the differences among target countries in the enabling environment on the ground (from a political, regulatory and economic perspective).
7. The evaluation will have a specific focus on youth and women inclusiveness. As the RISE project intends to promote the employment for vulnerable target in Morocco and Tunisia, the evaluation will analyses successful factors, opportunities and barriers of including vulnerable people socio-economic actions.

## Methodology

1. Review project documents (e.g. the project proposal, Log Frame, M&E Plan, technical note, learning process report and other materials elaborated by project teams and partners) and carry out preliminary interviews with the relevant staff.
2. Develop detailed Evaluation Proposal and Inception Report along with the questionnaires, methodologies and work plan.
3. Upon approval of the Evaluation proposal / Inception report, collect data at field level and remotely as per schedule, interpret and analyze them. Pay extra attention to data related to gender while collecting data and reporting on findings.
4. Review the information available in the project and progress reports (annual) generated by project staff.
5. Assess the relevance, coherence, efficiency, effectiveness, sustainability, scalability and impact of the project (by using indicators) as to whether it is consistent the intended outcomes. Use country analysis data, information against the indicators, and perspectives provided by stakeholders through key informant interviews / focus group discussion as a basis for the Evaluation team’s assessment.
6. Identify the reasons for delays.
7. Capture the evidence for the project’s achievements in the form of case studies too.
8. Review the project management style and provide recommendations for greater efficiency.

## Sampling methodology and sample size

The provider is expected to propose a methodology and sample for the Evaluation in his / her proposal.

## Responsibilities of the provider

The provider is required to:

1. Take the responsibility for the Evaluation and appoint a person as the contact point with Oxfam Italia for coordination purposes;
2. Compose the Evaluation team that is capable to deliver the quality outputs in a timely manner and mention the team composition in his / her proposal;
3. Make necessary appointments for the key informant interviews, mobilize participants, including direct beneficiaries (mainly SEs, SESOs and Aspiring entrepreneurs), for focus group discussions and visit the partners for data collection. Oxfam will provide necessary authorizations through letters to use the organization names by the provider. All communication and coordination in the country for collecting data should be the provider’s responsibility;
4. Manage all the logistics of field survey in coordination with RISE Project Managers;
5. Train an adequate number of enumerators that will be recruited for the field survey and supervise their work (both progress and the quality);
6. Ensure that all his / her personnel employed are following and signing the Oxfam Code of Conduct;
7. Present and discuss the preliminary and final findings of the evaluation with UfM and RISE consortium;
8. Submit the deliverables (mentioned under item 9 below), and,
9. Maintain the confidentiality of all information gathered.

## Responsibilities of OXFAM ITALIA

As the organization commissioning the Evaluation, Oxfam Italia will:

1. Provide all the relevant documentation for the Evaluation’s purposes;
2. Hold the responsibility for the provision of feedback / comments for inception report, questionnaires, draft report and presentations as per the agreed time frame. Provider can suggest the time frame;
3. Provide the templates for reporting and financial settlements;
4. Keep the relevant stakeholders (who are to be interviewed by provider) informed about the evaluation, including UfM;
5. Make necessary arrangements for meetings and presentation whenever required;
6. Review the timeline of evaluation and make necessary amendments in consultation with provider, and
7. Pay as per the agreed schedule upon the completion of minimum requirements.

## Deliverables

The provider is liable for the following deliverables:

1. An inception report, including details such as work plan, questionnaires, guidelines FGDs and KIIs checklist and a field survey plan. (This needs to be agreed with Oxfam Italia and UfM prior to the start of field survey);
2. Final external evaluation report (max 30 pages, without annexes) with executive summary. This needs to be submitted according to the following procedures:

The provider will prepare a draft report and share with Oxfam Italia and UfM followed by a PPT presentation of findings on a prior agreed date. Oxfam Italia and UfM will feedback on draft report and the provider then have to finalize the report. The final version of the report has to be validated by Oxfam Italia and UfM. Report should be comprehensive with benchmarks of all indicators set in log frame and other crosscutting issues. The provider needs to submit the electronic version (i.e. Word, Power Point, and Excel);

1. It could be requested to attend a face to face or virtual meeting to present the findings of the evaluation with all the Consortium’s partners and UfM.

The working language for the elaboration of all deliverables is **English**.

The period for the assignment is 1 months starting from the date of signing the contract until the submission of final report.

## Competency of provider

The provider should possess extensive experience (minimum 7 years) in undertaking evaluations of complex multi-country/regional development programs (special attention will be given to the experience in assessing initiatives insisting on entrepreneurship and private sector companies support as well as in assessing EU funded projects) and in-depth knowledge on relevant sectors and conducting evaluations, surveys researches etc. The proposed team shall comprise personnel with extensive experience (at least 5 years) in the related field. The provider should also have:

* Expertise in project cycle management and extensive knowledge of monitoring, evaluation, accountability and learning systems and data collection methods;
* Deep knowledge of the capacity building programs for MSEs, SEs, SESOs and Aspiring Entrepreneurs;
* Previous experience in working with INGOs’ procedures, approaches and operations;
* Acknowledged similar consultancies with recognized organizations;
* Demonstrated analytical and writing skills;
* Excellent knowledge of English and French (Arabic would be an asset);
* Computer skills (advanced user of Microsoft Excel or similar software; statistical software is an asset);
* Experience and knowledge of the targeted area.

## Evaluation of proposals and selection process

The potential and interested firms / individuals are required to submit a comprehensive proposal describing / articulating the work requirements outlined in this ToR. The language proficiency of the proposed personnel, especially of the field enumerators are important to indicate in the proposal.

All proposals will be evaluated against the following criteria:

*(The weight for the each criteria is given in percentages)*

1. Thematic expertise (at least the Team Leader) (15%);
2. Proposed team and their qualification and experiences (25%). With equal competences, gender-balanced teams will get a higher score;
3. Methodology and work plan which includes approach / evaluation design, sampling methodology, data collection methodology, data analysis, work plan etc. (30%);
4. Quality of presentation of proposal (10%).

80% of weight will be given to technical proposal and 20% of weight will be given to financial proposal. The applicant should score minimum of 40% in the technical evaluation to be eligible for financial evaluation.

The proposal and the budget should be prepared using in English.

## Terms and conditions

Payments will be done based on achieved milestones and submission of invoices by the provider approved by Oxfam. All incidental expenses, equipment and materials, accommodation and travel required for the assignment are to be procured by the provider except where otherwise indicated in the consultancy agreement.

The provider should follow the Oxfam’s Branding policies and ensure Oxfam and donor visibility rules and guidelines are respected. The provider and his / her team in the assignment must abide by Oxfam child protection policy, code of conduct, do not harm principles and Oxfam safeguarding policies. All requirements in respect of insurance including professional indemnity, worker’s compensation, public liability, superannuation and taxation, are the sole responsibility of the provider.

## Schedule of payments

1. 40% of total value of consultancy will be paid upon the signing of agreement and the submission of the inception report.
2. 60% of final payment will be paid after the acceptance of final report.

## Submission process

Interested candidates (individuals or companies) should send the comprehensive proposal describing / articulating the work requirements outlined in this ToR.

The proposal should include 2 (two) documents: a) Technical Proposal and b) Financial proposal, in Euro. Each document should be enclosed in separate file indicating the subject.

The abovementioned documents can be sent via email to [giulia.taccetti@oxfam.it](mailto:giulia.taccetti@oxfam.it) with mail subject: **Proposal for the Final External Evaluation of RISE**.

Deadline for the receipt of proposals by Oxfam Italy: **30 of May 2022 at** **24h00** Rome (Italy) time.

## Indicative timetable

|  | **Date** |
| --- | --- |
| 1. Publication of Term of Reference | 24 May 2022 |
| 1. Deadline for submission of the proposal for RISE final external evaluation | 30 May 2022 |
| 1. Notification of award | 10 June 2022 |
| 1. Contract signature | 13 June 2022 |
| 1. Implementation of the evaluation process | 13 June 2022 – 13 July 2022 |
| 1. Ending of RISE final external evaluation and delivery of the output final versions | 13 July 2022 |

**Annexes:**

***Annex 1: RISE project’s Logical Framework***

|  | ***Results chain*** | ***Indicator*** | ***Baseline***  ***(2020)*** | ***Target***  ***(2021)*** | ***Current value\****  ***(reference year)*** | ***Source and mean of verification*** | ***Assumptions*** |
| --- | --- | --- | --- | --- | --- | --- | --- |
| ***Impact (Overall objective )*** | To contribute to increase economic resilience and employment opportunities for vulnerable groups in Morocco and Tunisia in response to the socio-economic challenges exacerbated by the on-going COVID-19 pandemic | No. of jobs created (disaggregated by gender, age and rural/urban location)  No. / % of SEs and MSMEs that have increased their revenues/turn over and/or number of employees (disaggregated by location urban/rural, leadership w/m, employee’s w/m)  % of SEs and MSMEs that have recovered from the lost in their revenues caused by the COVID-19 pandemic  % of vulnerable groups (young and women) employed in targeted companies | 0  0  0  TBD in mapping at baseline | 10  70% of the targeted SEs and MSMEs  70% of targeted SEs and MSMEs  50% of targeted youth and women |  | Activity and final reports  Results of initial survey  Mid-term and final evaluations | *Not applicable* |
| ***Outcome (s) (Specific objective(s))*** | To unleash the potential of innovative entrepreneurial activities and improve institutional, technical, social and economic conditions in Morocco and Tunisia for inclusive growth and job creation | No. / % of SEs, SESOs, MSMEs in targeted countries reporting that the institutional, technical, social, and economic conditions have improved  No. of young people and women who engage in activities (debate/ training/projects etc.) related to social innovation | *TBD in mapping at baseline*  *0* | *70% of targeted SEs, SESOs and MSMEs report improved conditions*  *200* |  | *Activity and final reports*  *Mapping of initiatives and SE actors at baseline and end-line*  *List of attendees to events* | *Other actors address the immediate basic needs of communities that allow for target populations and their communities to actively participate in the project* |
| ***Outputs*** | **Op. 1** **Research and Analysis**  **1.1** SEs’, SESOs’ and MSMEs’ capacity building needs and key economic sectors are identified and analysed in Morocco and Tunisia  **Op. 2** **Capacity building and networking**  **2.1** Innovative and tailored capacity building activities are provided to Moroccan and Tunisian Social Entrepreneurship Support Organizations, Entrepreneurs and young aspiring entrepreneurs    **2.2** Connecting events between employers, employment agencies, SESOs, SEs and young aspiring entrepreneurs are organized in Morocco and Tunisia  **2.3** 1 study visit is organized in Italy (Tuscany) to exchange on effective business support mechanisms and policies for SEs affected by the covid-19 crisis  **Op.3** **Learning and Dissemination**  **3.1** Best practices on supporting mechanisms for social entrepreneurs and MSMEs facing economic and health crisis are developed and widely disseminated among national, and international audiences | No. of up-to-date analyses of target groups needs and promising economic sectors in targeted countries available (including recommendations for action)  No of actors involved in the survey  No of Social Entrepreneurship Support Organizations trained  No of Entrepreneurs trained  No of young aspiring entrepreneur trained  No of matchmaking events  No of participants in the events (employers and job seekers)  No. of participants in the incubation program organized in morocco  No. of internships organized in Tunisia  No of participants in the study visit (disaggregated per typology: SEs, SESOs and MSMEs)  No. of best practices identified (disaggregated per country: Tunisia, Morocco and Italy)  No. of public events to disseminate best practices among national and international audiences  No. of initiatives and video products (platforms, social media, etc.) used to disseminate best practice | 0  0  0  0  0  0  0  0  0  0  0  0 | 2  100 (50 Tunisia, 50 Morocco)  25 SESOs in Morocco and 15 in Tunisia  15 entrepreneurs in Morocco and 15 in Tunisia  50 young aspiring entrepreneurs in Morocco and 50 in Tunisia  4 (2 in Morocco and 2 in Tunisia)  100 per country  25 in Morocco  25 in Tunisia  100 (50 in Morocco and 50 in Tunisia)    15 (5 in Morocco, 5 in Tunisia and 5 in Italy)  9 (3 per country)  3 |  | Report of the Survey Database, Activity report  Training attendance records  Post-training evaluation forms  Activity and progress reports  Attendance records, activity and progress reports, meeting minutes  Internship agreements with the companies  Monitoring and activity reports  List of attendees in public events  Media reports | *Target groups are committed to improve their performance and to innovate through new support services and partnerships to achieve greater impact and outreach by overcoming the COVID-19 related crisis* |

***Annex 2: List of the partners for each country***

|  |  |
| --- | --- |
| **Country** | **Project Management Unit** |
| EU | Union for the Mediterranean |
| Italy | Oxfam Italy, Fondazione un Raggio di Luce |
| Morocco | Oxfam in Morocco and Enactus |
| Tunisia | TCSE – Tunisian Center for Social Entrepreneurship |