

Terms of Reference for a Mid-Term Evaluation

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| Program/Project | Achieving quality and accountability in our Disability Inclusive Development (DID) work: A 5 year proposal to strengthen the capacity and quality of CBM and partners' programme work (in the following: DID Programme) |
| Project Number | MYP 3292 |
| Partner Organisation | n/a |
| Project start and end dates | January 2016 – December 2020 |
| Evaluation Purpose | The evaluation is intended to provide CBM a detailed view of the status of the program informing an effective and efficient implementation of the remaining period as well as the development of the DID Initiative. |
| Evaluation Type | DID Programme Mid-term Review |
| Commissioning organisation/contact person | CBM International Petra Kiel, Evaluation Manager Petra.Kiel@cbm.org |
| Evaluation Team members (if known) | Team of 3: Development Evaluator; Disability Evaluator; Professional exposure for a disability activist from Global South. |
| Primary Methodology | Rights based, participatory and inclusive evaluation using mixed methods. |
| Proposed Evaluation Start and End Dates | Early Sept to mid Nov 2018 |
| Anticipated Evaluation Report Release Date | Draft by end Oct, final report mid Nov 2018 |
| Recipient of Final Evaluation Report | CBM Federation, potentially donors and summary available for DPO partners to increase learning and accountability. |

1. Background

The five-year program "Achieving quality and accountability in our disability inclusion development work" (in the following: DID Programme) started in 2016 and is set to conclude in 2020 ¹.

The background to this project is included in the proposal document originally submitted for decision for funding. It outlines a brief rationale on the pressing external and internal demands for CBM to significantly invest in capacity development on core skills in development and disability inclusive development (DID). The overall goal is to ensure 'CBMs development programmes are of a high quality and are used as an evidence base to model and advocate disability inclusion for mainstream agencies and local and national governments'. This investment is required to position CBM and partners amongst development actors to advocate, promote and evidence disability inclusion within our overall development programming - both field and advocacy as well as alliance programmes.

The DID Programme focuses on 5 Result Areas:

1. Systematic monitoring of DID quality standards, criteria, competency models for staff (levels 1-5).
2. Vibrant /active DID COP which nurtures dialogue, sharing & generation of knowledge on DID.
3. Country plans demonstrate a strong DID & gender analysis with effective plan for engagement with national and local government, DPOs, service providers, civil society to promote & contribute to inclusive SDGs.
4. CBM has a strong evidence base for DID work across all our mandated programme areas as well as across our internal systems and practice (10 case studies per year).
5. CBMs core development systems are well established to support DID and other programme work to be of a high standard.

During the life-time of this project, CBM's Federation Strategy and new operating model came into effect in 2017. The Strategy identifies key areas of work called Initiatives. Included in this is Disability Inclusive Development Initiative (DID Initiative) which will operate across the Federation building on the current workstreams of core systems and programmes, advocacy and CBM's external advisory. The DID initiative plan is currently under development and it is expected to be able to make use of the results of this evaluation to further refine its plan for future core systems and programme work.

2. Purpose of the Evaluation:

Mid way into the five-year plan of the DID programme the evaluation is intended to provide CBM a detailed view of the status of the program informing an effective and efficient implementation of the remaining period as well as the development of the DID Initiative. Especially given the change in the internal operating environment within CBM since this project started, thus optimising positioning of the MYP investment to support CBMs change processes and establishment of a DID initiative.

3. Objective:

The objectives of this mid-term evaluation are

- To assess the achievements and challenges against expected results as outlined in the MYP plan guiding CBM's global Disability Inclusive Development (DID) work;

¹ Multi Year Plan five year program proposal for P3292

- Collect and describe key lessons on what works best and what shall be continued, adapted or stopped;
- Develop recommendations on how to better situate and achieve more in light of the changing operational model for CBM (it is important to note that 1 year into the project and MYP changes in CBMs operating environment took place and are ongoing);
- Highlight critical areas that may be considered for the DID initiative planning and any Global Programme Development team in terms of capacity development priorities / gaps across disability inclusion (core systems) and inclusive development (programming and advocacy).

Overall, the evaluation will follow standard DAC criteria, incl. relevance, efficiency, effectiveness, impact and sustainability, based on a human rights and disability inclusive perspective.

4. Key issues and Evaluation Questions:

One key issue for CBM is how DID has evolved in the current transformation and changes processes in CBM to influence:

- **CBM core systems:** key policies and normative standards, including support to Global Programme Department (GPD) and Human Resources (HR) systems to address disability inclusion,
- **Capacity development** of DID, incl. training packages and resources both internal and external (Bridge, CRPD, SDGs) and engagement with critical advocacy areas, across gender and accessibility (e.g New Urban Agenda, AWID, CSW)
- **Development of DID Community of Practice:** dialogue, learning and exchange within the federation
- **Change processes:** Contribution to transformation streams, such as review of federation strategy, support to CBM's Country Planning Processes, contribution to development of the new 'three way country collaboration model' and support to knowledge and learning management with the new intranet project

With a view to understanding which working practices and resources have been effective to date in positively contributing to CBMs change processes and quality of results to-date and what can be further developed. In particular identifying any potential areas that are as yet untapped to optimise how DID can be effectively integrated across all of CBMs core systems and development approach.

The below DAC criteria based questions are meant as a guidance for the evaluators and shall be further refined during the development of the methodology. A human rights perspective and inclusion lens shall be applied to all evaluation questions.

4.1. Relevance and Quality:

- a. How far are the 5 result areas as defined in the original proposal still relevant? (Noting that the 5th result area was added temporarily to support GPD just for initial 2 year period, and part of result area 3 was in support of concluding commitments on partner capacity development for GPS under the previous P2448 project was just for first year).
- b. How relevant is the programme, designed during the previous Global Programme Strategy of CBM since the new Federation Strategy is in place and what implications are there for the remaining period?
- c. How is the programme increasing capacity of CBM to promote the CRPD and address this within our own core systems and practice, as well as link to Agenda 2030 and national development plans?
- d. Have expected results been described appropriately and has there been any positive or negative impact on planned results with the new way of working in CBM, in

- particular with a view to the Federation Strategy and the '3-way-country collaboration' approach
- e. How relevant are the suggested components of the programme in particular with regard to influencing change and building capacity in CBM

4.2. Effectiveness:

- a. In how far have the 5 results as outlined in the programme progressed? What has not yet been achieved and what would be needed in order to achieve all 5 results until 2020?
- b. What system/s have been put into place to monitor progress for various entities and stakeholders? Was this monitoring system effective and what could be done to improve it?
- c. What should the priorities of the DID team be for the remainder of the MYP (to end 2020), as well as a reduced project budget and more demand for DID capacity development support from COs and CBM partners? What 'course corrections' / adjustments are needed to ensure that the MYP 3292 can best support the upcoming DID initiative and 3-way- country collaboration working model?

4.3. Efficiency:

- a. Assess how the DID 5 year MYP has contributed to in terms of increasing the quality of CBM's programmes and core systems, and increased capacity of staff in the first 2.5 years.
- b. How has the DID MYP contributed to a more efficient way of working and collaboration within CBM's changing operating model?
- c. In how far have the resources provided for the 5 year programme been adequate and sufficient? How have they been used up-to-date? What can be expected with an anticipated reduced programme budget?

4.4. Sustainability:

- a. What mechanisms would be needed to make the results of the 5-year programme efforts sustainable?

4.5. Impact:

- a. How could greatest possible overall impact towards disability inclusion be achieved and measured in CBMs core systems and programme practice and
- b. The evaluation should provide clear recommendations to inform the remaining multi-year plan and to assist in informing finalisation of CBM's DID Initiative planning.

5. Methodology

Disability Inclusion and Global South Perspective:

The evaluation team ideally shall be made up of two evaluators that between them have expert knowledge in disability inclusion, development and evaluation expertise –and be able to deliver a rights based analysis with relevant recommendations for CBM. The team should include; a person with lived experience of disability, expert from the Global South; and provide a professional evaluation exposure for a young disability activist from the Global South (see details below under section 7).

It is expected that this evaluation will make use of **mixed methods**, including qualitative and quantitative data collection approaches. This will include desk review of key documents and reports; surveys (online) and individual and group discussions. CBM staff will support the evaluator in identifying a range of internal and external stakeholders.

Specific interviews and discussions ideally shall be held before/after the **DID Community of Practice Asia Workshop in Bangkok (1-5 October 2018)** in order to reach a variety of stakeholders in the most efficient manner. There is a potential to meet Country and Regional Hub Directors in Bensheim in September for further interviews (to be confirmed) – or a **field visit to a country team (potentially in West-Africa)**. The evaluation team should be available to travel to join DID COP workshop in Bangkok from 4-5 October and undertake focus group discussions on 6 October.

The evaluation team is expected to develop a detailed methodology and tools that will be agreed with CBM during the inception.

6. Limitations

The evaluation team will need to rely on reports which are in general not organized around the result areas of the log frame. Additionally the evaluator will need to rely on the availability of DID advisers and regional hub/country office staff for the interviews/surveys or other methods used to solicit information. The log frame itself includes a number of activities and assumptions regarding the networks and other actors which CBM does not control which might impact the quality of information. Finally, the costs for implementation are diffused across a range of global, regional, country and partner budget lines which will make the investment question (or the efficiency question) a challenge to address.

7. Evaluation Team and management responsibilities

a. Commissioning responsibilities

Petra Kiel, CBM International Office Evaluation Manager Petra.Kiel@cbm.org is responsible for commissioning this evaluation and is supported by Kathy Al Ju'beh, Senior Advisor for Inclusive Development, and Mary Keogh, DID Director.

The commissioning persons will support the evaluation team with the identification of stakeholders, interview partners and the arrangements during the Bangkok DID COP meeting.

They will also be responsible for the recruitment of the young disability activist to become part of the evaluation team. This person will require mentoring but will also be expected to contribute technically to the evaluation.

b. Qualifications of the Evaluation Team

TEAM: One lead evaluator needs to be from the development and disability sector. It is important to have a mixed team in terms of development and disability skills, of gender and background (i.e. at least one evaluator from the Global South and at least one evaluators with a lived experience of disability.) The person that shall receive professional exposure will be a person with disability, a youth activist or DPO member under 35 years of age. The latter will be recruited by CBM directly.

The **Senior Lead Evaluator** shall have the following qualifications:

- An advanced degree in social sciences related to the topic.

- 10 years of practical work experience in development with sound understanding of development issues, in particular as they relate to marginalised groups/inclusion.
- At least **5 years of Experience in evaluating multi-year plans/strategies** is essential.
- Experience in disability inclusive development or issues that relate to persons with disabilities will be an asset.
- Practical Experience in rights based evaluations and in capacity development programs will be an asset.
- Ability to work fairly independently, proactively seek out information and manage feedback and input primarily through online and face-to-face methods.
- Excellent written and verbal communication skills in English language.
- Ability to analyse and translate findings into practical guidance and present it in an appropriate format.
- Readiness to work in a mixed team, including a person to receive professional exposure during the entire evaluation process.
- The lead evaluator needs to have experience in managing teams and in mentoring people in evaluation methods.

The **2nd Evaluator** is expected to have the following qualifications:

- A degree in social sciences related topic.
- 5 years practical work experience in development with sound understanding of development issues, in particular as they relate to marginalised groups/inclusion.
- Sound knowledge of and work experience in Disability Inclusive Development.
- Fluent English communication skills.
- Readiness to work in a mixed team, including a person to receive professional exposure during the entire evaluation process.

The consultants will be responsible for the timely implementation of the evaluation, including arrangement of logistics and provision of accessible documentation and evaluation reports. Support will be provided on request to commissioning persons to ensure accessibility of meetings and interviews. The lead evaluator is also responsible for adequate mentoring of the “trainee” – additional days have been added, see below.

The consultants are responsible to ensure CBM’s “Child and vulnerable adults safeguarding” is adhered to throughout the exercise; they will ensure ethical and responsible data collection and management, incl. informed consent by interviewees and privacy/anonymity of information.

As a condition of entering into a consultancy agreement all team members must sign the CBM Code of Conduct and Child Safeguarding Policy and abide by the terms and conditions thereof.

Both individuals and teams consisting of the lead and junior evaluator can apply for this assignment. In case of individual applications, CBM will match the most suitable candidates. CBM will also identify and support a young disability activist/ intern from its DPO networks to become part of this evaluation. This is part of CBM’s ongoing commitment to find more opportunities for young activists to get exposure and experience in working with international development organisations.

c. Management of the Evaluation and Logistics

The DID team advisors, together with regional advisors will be responsible for providing external stakeholder introductions for information as needed. These entities will also be responsible for providing direct information either written, in the form of a survey or through interviews/ focus group discussions.

The Senior Advisor for Inclusive Development will be responsible for global level external stakeholder introductions and will also, along with the DID team, provide information and feedback to the evaluation process. CBM operating structure is in transition and at the current time there are: 5 regional offices: Latin America, West Africa, East Africa, Southern Africa, South Asia, in addition to a new Asia regional hub. The DID team operates out of the international office in Germany but is remotely located.

An initial orientation and introductions to the various internal and global external stakeholders will be provided by the Senior Inclusive Development Advisor. She will also provide relevant reports and documents and contact details for interview partners.

The lead evaluator will then be responsible for organizing all online communication, requesting additional information as needed and developing the initial report draft. The draft evaluation report will be reviewed by CBM before the evaluator completes the final report.

Communication accessibility needs as they arise based on the people being interviewed is the responsibility of the evaluator though the evaluation commissioners will support as possible.

8. Expected Results

An Inception Report to be delivered shortly after the initial briefings with the DID Initiative Director and Senior Inclusive Development Advisor. It will include the detailed and agreed methodology, schedule and responsibilities and suggested survey tools (questionnaires etc.).

An English language evaluation report which includes findings, analysis and recommendations is expected at maximum 4 weeks after completion of the review. In addition, the evaluation report should include a short executive summary and detail lessons learned. The report will be used internally by CBM and will be an important input into next phase planning as well as into the DID Initiative planning. Scope for drawing out specific lessons or learnings for external audiences should be considered in the organization of the final report. The final report needs to be presented in an easy to understand language, shall provide graphical presentations where appropriate, and needs to be drafted in accessible format (CBM will provide guidance on this).

Before presenting the draft final report an online meeting shall be scheduled with main stakeholders, incl DID Director, Senior Inclusive Development Advisor, MAs and Evaluation Manager to present initial findings and for final clarifications.

The report should be presented in the standard evaluation report format of CBM which will be provided to the evaluator at the start of the contract. This should be no more than 30 pages in length, excluding annexes.

The report will be made available internally to the program department, the global and regional DID advisers, the DID Community of Practice, Regional Hubs and Country Offices and Member Associations. Evaluation results will also be shared with external stakeholders who have participated in the evaluation process.

Upon receipt of the draft final report, CBM will take 2-4 weeks to review the report and consult on the finalisation with the consultants.

Upon completion of the report, the evaluator/s will be required to present back the key findings from this evaluation via an online webinar (GoToMeeting) for relevant CBM staff.

9. Duration and Phasing

| Task | Location | Maximum number of work days anticipated for a 2 member team |
|---|--------------------------------------|--|
| Desk review | Home based | 6 |
| Inception Briefing and Report | Home based/ online | 4 |
| Development of survey tools, conduct of surveys | Online | 10 |
| Mentoring of young professional | TBC | 6 |
| Interviews/focus group discussions in Bangkok (incl. travel time) | Bangkok (between 4 and 7 October) | 10 days incl travel (depending on origin of evaluator) |
| Potential Meetings in East-Africa | Kenya or Ethiopia | 10 days incl travel (depending on origin of evaluator) |
| Online feedback of initial findings to CBM main stakeholders | Online | 2 |
| Analysis and Report writing | Home based | 7 |
| Finalising Report (based on comments received by CBM) | Home based | 4 |
| Presentation of findings during webinar | Online | 1 |
| TOTAL | | 60 |

10. Expressions of interest and selection process

The consultant/s shall provide an offer (Expression of Interest) including the following:

- Description of the consultant, incl. CVs of the suggested evaluator/s.
- A detailed approach and methodology for achieving the goal of the assignment.
- A detailed schedule incl. steps to be taken and responsibilities of team members.
- Statement of availability for conducting the assignment (start in early September, final report in November).
- Financial offer, incl. professional fee, incl. taxes, and incidentals.

The commissioning entity may require proof of similar evaluation experience in the form of previous reports and/or references during the selection process.

The offer shall be sent in electronic format to Petra Kiel, CBM International Office Evaluation Manager petra.kiel@cbm.org by **19 August 2018**.

Selection of the consultants will be based on the criteria outlined above and will be undertaken by 3 CBM staff (incl. DID initiative lead, IO Evaluation Manager, CBM Member Association).

CBM holds budget authority and expects the evaluation proposal to include sufficient budget detail to assess the proposed cost against the scope of work. Payment details will be lined out in the contract.

11. Background Documents (will be provided at start of evaluation)

- 5 year Multi-year plan and narrative
 - Quarterly PPRs, quarterly and bi-annual DID team reports
 - Advisory working group and DID team reports
 - List of global, regional and country level contacts and email contact details and DID COP list of membership
 - Reflection pieces, internal learning documents
 - Updates to the community of practice, webinars and of yammer groups
 - Annual budgets over the time period
 - Evaluation Report from the preceding P2448 Partner Capacity Development Project
 - Policy papers/ resources / capacity development materials developed during the project period to date
 - Evaluation report templates
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