



OPEN SOCIETY INSTITUTE

Education Support Program (ESP)

Terms of Reference for the Main Evaluator (Consultant)

RE:FINE's Preliminary Assessment of Achievements

Rationale

In 2004 The Education Support Program (ESP) established an education grant making fund, the *Resourcing Education: Fund For Innovations And Networking(REFINE)*, to support projects in the area of the general education sector that further open society goals in identified priority areas. It provides strategic grants for networking opportunities between NGOs and other organizations that support gains already made in the education sector in order to maximize impact and enhance capacity of civil society actors in bringing about school reform.

Since the launch of the fund, ESP has supported fifteen projects that further open society goals in four education priority areas. Those priority areas are: **equity**, which includes minority rights, gender, equal access to information, and equal education opportunities; **quality**, which includes learning processes that lead to outcomes that further the objectives of open society; **public accountability**, which includes management, governance and transparent policy processes; and **anti-corruption initiatives**, that intersect accountability and equity.

ESP is commissioning an assessment study which will examine how the funded projects are contributing to the following objectives:

- **promoting networking for enhanced impact**, promoting exchange of local knowledge and fostering collaboration among civic organizations that support open society goals in education within and between countries, and across geographical regions;
- **building capacity and resources in the region** to promote open society goals in the general education sector in the targeted countries;
- **promoting civil society involvement in education change** in partnership with governments and other local players transnationally and locally;
- **strengthening advocacy on educational issues**.

Objective of the study

The major focus of the study will be on gathering information that will help:

- to assess projects' achievements to date (first stage of the study: April –August 2006),
- to inform the future design of the grant program (second stage of the study: September-December 2006).

The additional information obtained from the study will help:

- to identify valuable experiences and resources produced for their further application and dissemination in the network;
- to identify resources (manuals, guidebooks, methodology) that could be further developed to be offered to the OSI network and its partners.
- to provide recommendations to on-going projects on how to maximize project impact.

Main focus of the study

Stage 1. Assessment of current achievements.

Ideally all of the funded projects should contribute to all four objectives within the four priority areas of the fund. In order to verify the extent to which funded projects contribute to these objectives, we have developed the following proxy indicators to guide the assessment's design.

Networking for enhanced impact:

- potential for initiatives in partner countries to yield sustainable results;
- the extent to which projects enhance networking in and across the target countries on specific issues;
- whether the networks established in the projects give rise to the creation and maintenance of other similar networks;
- whether the projects have been able to bring together civic organizations that have not previously collaborated and to contribute to successful collaboration in furthering open society goals;
- potential of the grantee to transfer skills and knowledge to the project partners;
- potential of the grantee and partner countries to generate local funds for in-country projects.

Capacity building:

- potential of the grantees to build sustainable capacity (human resources and learning resources) in the partner countries
- potential of the grantees to develop quality resources for the network in one or more of the four priority areas;
- potential for the trainers trained through the grant activities to sustain their future training capacity without further grant support.

Civil society involvement in education change:

- potential of a grantee to bring NGOs together in ways that enhance their impact on the issues of educational reform;
- level of the NGO involvement in the education change (innovative, facilitative, advocating, etc)
- partnership models developed through these projects (teacher/trainer; network of partners)
- potential and ways of further cooperation after the project is over.

Advocacy:

- potential of the grantees for leveraging education changes on specific issues within priority areas of the fund;
- potential of the grantees and projects' target group to raise awareness on specific issues in four priority areas of the fund and reach a wide constituency;
- potential of the grantees to strengthen advocacy across countries on specific issues of the fund.

At this stage, we will also look into the following aspects:

- underserved priority areas within REFINE;
- geographical spread of REFINE projects;
- analyses of fund distributions among partners;
- grant fund design strength and weaknesses;
- the balance/relationship between OSI REFINE contributions and those of other donors;
- extent to which the same NGOs should participate in other REFINE funded projects;
- to what extent longer term support might be offered to successful projects funded from REFINE and on what conditions;
- what are the resources (manuals, guidebooks, methodology) that could be further developed and offered to the OSI network and its partners.

Stage 2. Informing the future design of the grant program.

The study results from the first stage will inform the design of instruments for the second stage. The major difference between the two stages will be the target group to be interviewed and the nature of questions to be asked. If the first stage focuses on REFINE grantees and beneficiaries, and projects' achievements, then the second stage will focus on education leaders from about 100 OSI related NGOs and their ideas for improvement of fund's operation. Questions related to the fund's design, its strengths and weaknesses are to be explored at this stage as well.

Methodology

Staff will instruct the evaluator on the goals and purposes of this study, and provide all information necessary for the development of the assessment instruments. Given that this study will look into twelve REFINE projects that are either in the middle of their final implementation year or in their first year, this study is about identifying *potential* areas of achievement, rather than specific and tangible completed deliverables.

Assessment instruments of the study will include: review of grant files and documentation, questionnaires to project stakeholders, phone interviews, and field visits. Staff proposes looking in depth at two projects: Education against corruption, Lithuania and Facilitating Curriculum Reform, Slovakia. These projects have almost similar methods for achieving certain objectives and it is important to analyze their preliminary achievements. It is likely that field missions might be substituted with in-depth phone interviews and questionnaires since both of these projects involve big number of partner organizations in different countries, and it might be too difficult to gather all target constituency in one project country.

The evaluation team will consist of the main evaluator and 2-3 research assistants (evaluation alumni of the ESP/TC courses will be offered this opportunity). The main evaluator will design the methodology and instruments (for each project and country) for evaluation stage one and two. He/she will be responsible for in-depth evaluation of the Lithuanian and Slovakian projects and possibly field visits to these countries if these are considered necessary. The evaluator will be responsible for writing up the final evaluation report from both evaluation stages. He/she will have a leading role in the planning meeting in Budapest and will finalize the evaluation instruments based on the suggestions from the meeting. The evaluator will be responsible for the work of the research assistants.

Research assistants will assist with the evaluation process and in particular in conducting phone interviews, administering questionnaires, and collecting data.

Staff will organize a two-day planning meeting in Budapest, to finalize the methodology and instruments, as well as procedures and timelines for the study. About 2-3 educational/evaluation experts will be invited to the meeting to advise on the development of methodology and instruments.

Assessment portfolio: 12 REFINE projects from 10 countries.

Duration of the study: March-December 2006

Timeline

Stage 1. Assessment of current achievements (April –August 2006).

1. Contract evaluator and research assistants (week 3, April 2006).

His/her first task will be to prepare the draft evaluation concept (methodology, design, instruments) for the meeting.

2. Face to Face Meeting (week 1-2, May 2006 in Budapest, to be confirmed).

During this 2-day meeting , we will review the methodology, research instruments, sample plan, time-line and schedule proposed by the evaluator.

Participants of the two day meeting: main evaluator, Hugh McLean, Thomas Alexander and ESP representatives.

During the third day the main evaluator will work with research assistants to prepare them for their work (what, when, how to do, how to keep record, what output needs to be delivered to the main evaluator) with detailed introduction in instruments.

3. Evaluation period (**May-June 2006**).
4. Report writing (**June-July 2006**).
5. Finalization of the evaluation report (**August 2006**).

Stage 2. Informing the future design of the grant program (September-December 2006).

The time line for this stage will be developed after Budapest planning meeting.

To apply for the temporary position of the main evaluator

Please send **by April 21, 2006** the following documents:

- Letter of interest that states clearly evaluation/research skills and experience in the education sector, and understanding of the general education issues;
- CV;
- Evaluation concept that contains formulation of the research methodology and work plan;
- Example of previous evaluative work if available (e.g. evaluation report);
- Proof of proficiency in English with strong writing skills;

Documents should be sent to Nora Henter at nhenter@osi.hu. We will send you examples of REFINE project proposals to prepare the evaluation concept upon your request.

Responsibilities

- to design the methodology and instruments (questionnaires, questions for phone interviews for each project and country) and analyze data from the field for two evaluation stages;
- to conduct in-depth evaluation the Lithuanian and Slovakian projects and possibly carry out two field visits to these countries if these are considered necessary.
- to lead May planning meeting in Budapest and finalize the evaluation instruments based on the suggestions from the meeting;
- to supervise the work of research assistants.
- to write up the final evaluation report;

The main evaluator will do most of the work on-line from his/her place of residence.

Reporting

The evaluator will work closely with Natalia Shablya, Program Manager, to discuss on day to day basis progress made towards the preparation and carrying out of the study.

The Program Manager will provide oversight for the development of the study, the work of the evaluator and assistants.

The draft evaluation report and final reports will be reviewed by REFINE committee.

Travel

The evaluator will be expected to come to May 2006 meeting in Budapest and possibly carry out two field trips in May/June 2006.

Deliverables

- Evaluation concept, CV, letter of interest, and example of evaluative work upon application;
- Research instruments (developed questionnaires, questions for phone interviews; and individual meetings) and work plan for research assistants for the first stage of the evaluation to be submitted prior to the May meeting;
- Draft evaluation report for the first stage by the middle of July 2006;
- Final report for the first stage by August 2006;
- Draft evaluation report for the second stage by November 2006;
- Final report by the beginning of December 2006.

Honorarium and business related expenses

All business related expenses for travel to Budapest the two field trips (airline tickets, hotel accommodations, meals, taxi charges, DHL etc); along with phone costs will be reimbursed. A lump sum fee will be offered as honorarium for the work outlined above. The fee will be paid upon the submission of the final assignment. The lump sum fee is to be negotiated with the evaluator and it will be based upon his/her experience.

Attached: REFINE call for proposals

Attached: REFINE funded grants of 2004 and 2005 documents.