

## INCLUSION II

### External Monitoring and Evaluation

#### TOR for Consultancy services

Caritas Europa is a network of 49 member organisations in 46 countries. Caritas is present and active in every country in Europe, with well-developed national, regional and locally based structures assisting people experiencing poverty at grass roots level.

### 1 Introduction

Caritas Europa (CE) benefits from EU co-funding through the Community Action Programme *PROGRESS* (DG Employment, Social Affairs and Equal Opportunities) for the implementation of its “*INCLUSION*”<sup>1</sup> project. Caritas Europa has benefitted from this support since 2008.

Three year *partnership agreements* are signed based on **Triennial Strategic Plans** (INCLUSION I: 2008-2010; INCLUSION II: 2011-2013). Each year the EC confirms its co-financing<sup>2</sup> based on detailed **annual work plans**

By implementing our work plans we are expected to help achieve the following *PROGRESS* “immediate outcomes” which, in turn, should contribute to the Europe 2020 Strategy’s objectives. The outcomes sought are:

1. to improve **organisational capacity and management**;
2. to **voice the conditions, concerns and expectations** of (1) people experiencing poverty and social exclusion, discrimination and inequality between women and men or (2) organisations providing services to people exposed to social exclusion, discrimination and gender inequality;
3. to **reinforce the skills of the network and its member organisations’ to advance, support and further develop EU objectives and priorities at national level**;
4. to better **integrate cross-cutting issues** in day to day work (e.g. gender, poverty, disability and non-discrimination)

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<sup>1</sup> *INCLUSION* (*Integrating and Nourishing Caritas Learning and Understanding of Social Inclusion through Optimal Networking*)

A new strategic framework has been elaborated, agreed upon and officially adopted in 2011. It will strengthen the network to reinforce its role as a reliable global player in a changing, new world. It defines priorities and goals for the upcoming decade as well as mid-term outcomes for 2015, and thematic outcomes and themes for 2012 and 2013. New **working structures** have been put in place which will allow for increased effectiveness and efficiency, while facilitating accessibility to the organisation for our members.

**The aim of this consultancy is four-fold:**

1. Development of a monitoring and evaluation approach/model for Caritas Europa, that is compatible with the EC requirements and that can be used by all staff;
2. Evaluation of the relevance and the effectiveness of the INCLUSION Project: To what extent have the implemented activities contributed to the outcomes and results sought for? (2011-2013)
3. A deeper analysis of a selection of key activities: p.e. National Reform Programmes (NRP) shadow report; summer university; trans-regional conferences: the achievements, their effectiveness, the adopted approach and recommendations for future editions of these events
4. Accompanying Caritas Europa at a number of strategic moments such as annual planning and internal evaluation sessions.

**The tasks involve:**

**In 2012**

- Preparatory meetings with the Caritas Europa senior management team in view of planning and methodology;
  - Consult Caritas Europa on the overall planning process;
  - Developing a simple monitoring & evaluation methodology that can feed into the performance management requirements of the European Commission and be used as an overall Caritas Europa monitoring & evaluation system;
  - Facilitating a meeting with Caritas Europa staff on mainstreaming the monitoring / evaluation model into daily work;
  - Identify the best way of engaging the Caritas Europa Network in the evaluation;
  - Following up regularly with the Caritas Europa Senior Management Team;
  - Analysing the data and information gathered throughout the year and identifying key questions that need to be addressed in order to improve the development of Caritas Europa;
  - Undertaking a first assessment of Caritas Europa's work carried out in 2011 and 2012 while providing deeper analysis of and advice on a selection of recurring key events allowing for improved effectiveness in the future.
- Lay the basis for an overall evaluation of the three year project (2011-2013) in 2013

### **In 2013**

- Preparatory meetings with the Caritas Europa senior management team in view of planning and methodology;
- Consult Caritas Europa on the overall planning process;
- Based on the in 2012 elaborated monitoring & evaluation system, undertake an overall final evaluation of Caritas Europa's work carried out in the framework of INCLUSION 2011-2013 addressing
  - the extent to which implemented activities and their achievements/outputs contributed to the outcomes and results sought for;
  - the effect of the new strategic framework and working structures that were put in place in 2011
  - Recommendations for better results and increased impact

### **Deliverables**

Among the deliverables will be:

- Proposals for a Caritas Europa Evaluation and Monitoring system (draft / final);
- Assessments of key Caritas Europa activities plus recommendations (draft / final);
- Evaluation / assessment reports (draft / final);
- Reports relating to events facilitated, or participated in;
- Advisory notes

**A rough calculation indicates that around 45 person days are required for the mentioned tasks- over the two year period- for which a maximum of € 40.000 (VAT included) are available.**

The Consultancy Contract will be signed for the period of 2 years, but will hold the clause stipulating that the second year of consultancy will depend on the confirmation of EU funding for the third year of the INCLUSION project (2013).

### **Required Profile:**

The service provider will:

- Have solid – and evidence based – experience in monitoring and evaluation processes;
- Have experience with advising broad NGO networks;
- Have knowledge of and - preferably – experience with EU contractual requirements;
- Have excellent communication and reporting skills in English.

## **Proposals:**

If interested in this assignment, please send us:

- A brief technical note reflecting your understanding of tasks and the methodology you foresee to apply;
- A draft work plan reflecting the above elements
- Your financial offer based on the number of person days that you intend to spend on this assignment as well as any travelling costs to be foreseen;
- The justification of how your experience and profile matches the above requirements.

Above will be submitted by e-mail to Caritas Europa by the deadline of **Tuesday 31 January** to the following address: [mpikaar@caritas-europa.org](mailto:mpikaar@caritas-europa.org)

Starting date: A first team meeting will take place in February 2012 to discuss the submitted proposal and agree on a draft work plan for the two years.