**TERMS OF REFERENCE**

**< External Evaluation**

**of the**

**EU4Culture: Stronger Communities and Initiatives Project >
<Armenia: Gegharkunik, Kotayk and Shirak Regions** **>**

**Background and Context of the Evaluation**

Funded by the European Union, the Institute for International Cooperation of the German Adult Education Association (DVV International) and its partners are implementing the **EU4Culture: Stronger Communities and Initiatives Project** (hereinafter EU4Culture or the Project) aimed at enhancing CSO capacity for cultural and tourism promotion in Shirak, Kotayk and Gegharkunik regions of the Republic of Armenia. The project aims to contribute to inclusive and sustainable growth of these regions by helping selected clusters/communities identify and effectively utilise their material and non-material assets, including natural, cultural and human resources that promote cultural and tourism development and increase environmental awareness.

The three main objectives of the Project are to

* Strengthen CSOs capacity in developing and implementing community development projects through culture and tourism;
* Strengthen collaboration between CSOs and national and local authorities;
* Raise the level of cultural participation and increase contacts between people, expand the employment opportunities of the population of target regions.

To implement the Project DVV International has partnered with Media Initiatives Center, Armenian center for democratic education-CIVITAS NGO and Association of Museum Worker and Friends (AMWF). DVV International acts as Project Coordinator with the three partners being beneficiaries. Agreements were signed between the Coordinator and the beneficiaries according to which project implementation and financial responsibilities and undertakings were set. In addition, regular coordination meetings were held providing updates and planning the upcoming activities.

Final beneficiaries and target groups of the Project initially included 120 regional and local CSOs and other stakeholders (including regional and local authorities) and residents of targeted regions, clusters and communities, school students and youth, museum staff and visitors. However, throughout Project implementation the number and the type of target groups changes and is reflected in the annual reports and the updated Log Frame.

In March-August 2018 the EU4Culture was launched in target regions of Gegharkunik, Kotayk and Shirak through a series of events that included Project presentations to regional authorities, fact finding missions to target regions, creation of Multi-Stakeholder Groups (to act as local public bodies for Project planning, implementation and monitoring) and public discussions at which the Project was presented to 168 main stakeholders (71 of them female), i.e. regional CSOs, local authorities and others. Three main outcomes resulting from these events included full stakeholder awareness of the Project, signing of three Memorandums of Understanding (MoUs) with regional governors, and, most importantly, selection of the target project clusters. In each of the three regions a cluster of 5-6 villages/ communities were selected through a consultative process:

* Gegharkunik region: SEGAMA Cluster that includes 3 urban communities with an affiliated rural community, i.e. Sevan and Lchashen, Gavar and Noratus, Martuni and Madina;
* Kotayk region: Arzakan, Bjni, Megradzor, Artavaz and Hankavan communities;
* Shirak region: Arpi cluster including Shaghik, Garnarich, Tsaghkut, Zorakert, Ardenis, Berdashen communities.

Once the groundwork for the Project launch was completed and Project structures established, remaining first year Project Activities focused on regional CSO/museum trainings. The process started with an intensive Training of Trainers program targeting experts that later became involved in development and delivery of relevant courses to CSOs and museums. Eleven (11) training sessions were conducted for 157 (87 female) participants focusing on tourism strategies in Armenia and tourism infrastructure, asset-based community development, community-based tourism, use of multimedia in museums, etc. In addition, key Project documents (including Communication and Visibility Plan, Procurement Plan, M&E Plan and data collection database) were developed to guide Project Implementation and were shared with all partners/beneficiaries.

In Project Year 2 (February 2019-January 2020), the EU4Culture made noticeable progress toward its goals and objectives, reaching a number of key outputs and outcomes, including:

* CSO capacity building through trainings that started in Project Year 1 completed in Year 2 resulting in 164 (96 female) stakeholders trained through over 15 sessions on topics related to tourism, business, community development, social entrepreneurship (SE), PR, marketing and others (implemented by DVVI).
* Multi-media exhibitions were created at three regional museums through which these museums will be modernised to use technological and multimedia solutions to present new content (implemented by MIC supported by AMWF).
* Non-formal learning labs were created at three regional museums by upgrading/modernising their facilities and providing opportunities to use the museums as educational environments (implemented by CIVITAS supported by AMWF).

Development of the sub-granting documents, announcing sub-grants in two directions (for pilot projects and SEs), two-layer sub-granting process (concept notes and full applications) and selection of CSOs to implement sub-grants were primary Project Year 2 activities. Some important highlights include:

* Sub-granting guidelines, application packages, evaluation panel documents, sub-grant agreements (including detailed Terms and Conditions) and all related documents developed.
* 21 pilot projects and 17 social entrepreneurship project concept notes received, evaluated and 8 and 11 shortlisted respectively.
* Intensive mentorship and consultancy provided to shortlisted CSOs through informational and feedback sessions and proposal revisions by Project teams, expert and mentor direct engagement to work on full applications, as well as targeted training sessions.

At the completion of all these processes, in September-October 2019, sub-granting agreements were signed with all 8 CSOs implementing pilot projects (with four of them starting implementation immediately, the other four in January-February 2020). Sub-granting agreements with 6 social enterprises and 4 social entrepreneurship research projects were signed in February 2020.

2020 is the final year of the Project (ending in January 2021) and despite the challenges of COVID-19 the Project activities progressed (albeit with some delays and approach changes) with several key results achieved as of January 2021[[1]](#footnote-1), including:

* 8 pilot projects, 6 social entrepreneurship projects and 4 SE research projects are successfully completed and results are delivered.
* A business and marketing consulting company was involved through restricted call to support 6 social entrepreneurship project sub grantees in finalising business and marketing plans and developing sustainability plans.
* One online idea generation festicamp was organised for the Project beneficiary CSOs and 3 innovative ideas were selected, received funding and were successfully implemented.
* 2 consultancy sessions on establishment of Endowment Funds in the target regions were conducted.
* 12 student groups of regional schools and colleges developed small community initiative projects with mentors’ support, and received grants for implementation.
* Two (2) regional museums were equipped with new technological solutions.
* Production of 4 documentary films / short videos for the overall promotion of the project.

In addition, upcoming activities include:

* 12 sub grant projects of student groups will be finalised.
* 1 consultancy session on Endowment Fund in Kotayq region will be conducted
* Exchange visits between regional CSOs will be organized.
* Production of 4 documentary films / short videos for the overall promotion of the project will be finalised.

**Purpose and Objectives of the Evaluation**

The purpose of the evaluation is to assess the relevance, coherence, effectiveness, efficiency, impact and sustainability of interventions under the EU4Culture Project.

The specific objectives of the evaluation aim to

* Determine the extent to which the Project has been successful in achieving its goals and objectives as well as key outcomes and outputs defined in the Project’s logical framework (will be provided to the evaluator by the Project team).
* Evaluate the extent to which project implementation (inputs and activities) were in line with original project design, and whether the design was sufficiently agile to address occurring changes and emerging challenges during the implementation (including COVID-19 consequences)
* Assess the extent to which the project has effectively implemented its various components and determine the long-term sustainability of results
* Identify the unintended results of the Project (both positive and negative) and assess their impact on the targeted clusters/CSOs/beneficiaries
* Analyze the Project’s experiences and document results, including success/best practices and challenges
* Identify the lessons learnt and develop recommendations to inform similar projects and future interventions

***In addressing the objectives of this evaluation, the main focus should be on the main target group of the Project, that is the regional CSOs and other stakeholders, such as museums, local authorities, schools, community population and others***.

**The Scope of the Evaluation**

The timeframe that the evaluation will cover is *the period between February 2018 to January 2021*. [[2]](#footnote-2)

The *conceptual scope* of the evaluation will include all the components of the Project, particularly

* Capacity building activities among the three target groups - CSOs, museums and school teachers and students including trainings, mentorships, consultancy and other interventions;
* Projects and products implemented/created by CSOs/museums/ schools under the subgranting component of the Project including pilot projects, social entrepreneurship projects, multi-media exhibitions and others;
* Impact of the Project on CSO partnerships with regional and local authorities, communities, other stakeholders.

The *geographical coverage* will include three regions - Kotayk, Shirak and Gegharkunik and the respective clusters and communities, particularly:

* Gegharkunik region: SEGAMA Cluster that includes 3 urban communities with an affiliated rural community, i.e. Sevan and Lchashen, Gavar and Noratus, Martuni and Madina;
* Kotayk region: Arzakan, Bjni, Megradzor, Artavaz and Hankavan communities;
* Shirak region: Arpi cluster including Shaghik, Garnarich, Tsaghkut, Zorakert, Ardenis, Berdashen communities.

The evaluation will primarily focus on the *stakeholders and beneficiaries* of various project interventions including regional and local CSOs, particularly 16 sub-grantees and 4-5 co-applicants, regional and local authorities, museum staff, residents of targeted regions, clusters and communities, school students and youth, as well as key *implementing partner organisations* (DVV International, MIC, CIVITAS, AMWF) and the *donor organisation* (EU).

Project proposal, logical framework, annual reports with all relevant amendments and other Project materials (such as Grant guidelines or sub-grantee applications) will be the primary documents guiding the evaluation as they state what the project is intended to achieve on all levels (outputs, outcomes and goal/impact), how these achievements will be gauged, provide details on the key M&E tasks and indicate the precise time frame for conducting monitoring and evaluation.

Primary users of the evaluation findings, conclusions and recommendations will be DVV International Armenia and DVV’s Headquarter, Delegation of the EU to Armenia, partner organisations, CSOs and other partners and stakeholders.

**Evaluation Criteria and Questions**

Key evaluation questions, based on the OECD/DAC[[3]](#footnote-3) and EU evaluation criteria[[4]](#footnote-4) of relevance, coherence, effectiveness, efficiency, impact and sustainability, are listed below. The list, however, is not exhaustive.

***Relevance***

* To what extent have the objectives of the Project corresponded to the needs and interests of different target and beneficiary groups? To what extent were they responding to gender-specific needs?

***Coherence***

* To what extent have different components of the Project been coherent internally and how did the interlinkages between different activities of the Project work (e.g. to what extent were the activities by DVV International, MIC, AMWF and CIVITAS coherent with each other)?
* To what extent has the Project been coherent with other interventions with similar objectives? How consistent have the Project interventions been with external actors’ interventions in the same context?

***Effectiveness***

* How successful have the interventions under the Project been in achieving the defined objectives? What have been the quantitative and qualitative effects of the Project?
* To what extent do the observed effects link to the interventions?
* Are there differences in progress from cluster to cluster and from stakeholder to stakeholder and what are the factors determining those variations?
* What were the challenges hindering the effectiveness of the interventions (if any)?

***Efficiency***

* To what extent has the Project been cost effective? Are the benefits associated with the interventions proportionate to the cost?
* To what extent has the Project made good use of the human, financial and technical resources to pursue the achievement of the Project objectives?
* To what extent are the costs of the intervention associated with different stakeholder groups proportionate with the distribution of the generated benefits?

***Impact***

* To what extent has the Project contributed or is likely to contribute to long-term changes both in terms of CSO capacity and social and economic changes for targeted clusters?
* What are indirect, secondary and potential consequences of the interventions for targeted regions (Kotayk, Gegharkunik and Shirak) and for broader society?

***Sustainability***

* How likely are the effects resulting from the Project to last after the intervention ends?
* To what extent have the Project interventions contributed to the enhancement of capacities and development of ownership among targeted CSOs, local communities?
* How successful was the Project in establishing mechanisms to ensure durability of Project results after the end of the project?

**Evaluation Methodology**

The evaluation will apply a mix-method approach by combining qualitative and quantitative methods of data collection and utilising multiple data sources. To enhance the credibility of evaluation findings the analysis will apply the triangulation approach by integrating the evidence generated from different informants through different data collection methods.

*Quantitative methods[[5]](#footnote-5)*

Quantitative methods will support the monitoring system of the Project by collecting and analyzing evidence to assess the progress of the Project towards selected outcome level results, particularly those targeting the capacity building of CSOs involved in the Project. In Year 1 of Project implementation a baseline survey was conducted among 44 target CSOs resulting in essential contextual data collection on a number of Project indicators (mostly on outcome level). To fully assess and report the final progress against the baseline indicators, the evaluation will conduct a follow-up survey among over 20 target CSOs. The survey will help to measure the quantitative indicators and will show the extent of the progress compared to the baseline study results. To generate comparable data, the follow-up survey will use the same set of quantitative questions as in the baseline study. The availability of the baseline survey database makes it possible to analyze the findings of the follow-up survey in comparison with the results from the baseline survey for a subset of over 20 CSOs.

The indicators covered by the baseline survey and to be addressed by the follow-up survey, are listed below as defined in the Logframe matrix of the Project.

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| --- |
| **Impact-level Objective.** To contribute to inclusive and sustainable socio–economic development of Armenia, by facilitating engagement of civil society in poverty reduction in Shirak, Gegharkunik and Kotayk provinces through cultural and environmental education and initiatives aimed at community-based tourism development and enhancing people to people contacts at local, national and regional levels. |
| *Indicator*  | *Baseline survey result (2018)* | *Follow-up survey result* |
| Proportion of women/men led targeted regional CSOs involved in delegated service provision, social entrepreneurship and civic/policy initiatives  | 32% (22% of women-led and 10% of men-led targeted regional CSOs)  | TBD |
| **Outcome 1:** Favourable conditions created for CSOs of the targeted regions to become independent development actors in their regions.  |
| *Indicator*  | *Baseline survey result (2018)* | *Follow-up survey result* |
| Indicator Oc1.1Proportion of women- and men-led targeted regional CSOs contributing to local social-economic development initiatives and projects | 55% (38% of women-led and 17% of men-led targeted regional CSOs)  | TBD |
| **Intermediary Outcome 1:** Cooperation of CSOs with state institutions and local authorities is enhanced. |
| *Indicator*  | *Baseline survey result (2018)* | *Follow-up survey result* |
| Indicator iOc1.1Proportion of women and men-led targeted regional CSOs cooperating with state and local authorities  | 42% (35% of women-led and 7% of men-led targeted regional CSOs)  | TBD |
| **Intermediary Outcome 2:** CSOs capacity in developing and implementing projects supporting community-based development through culture and tourism is strengthened. |
| *Indicator*  | *Baseline survey result (2018)* | *Follow-up survey result* |
| Indicator iOc 2.2.Proportion of targeted regional CSOs with diversified sources of funding. | 36% of targeted regional CSOs. | TBD |
| Indicator iOc 2.3.Proportion of targeted regional CSOs with improved skills of project design and/or implementation. | 32% of targeted regional CSOs with improved project design skills and 34% of targeted regional CSOs with improved implementation skills. |  |

Data received from quantitative survey will be triangulated with information from qualitative methods described below and it is expected that general findings and conclusions will derive from both.

*Qualitative Methods*

Proposed qualitative methods include interviews and focus groups with key informants as well as desk research of program documents, reports, CSO products and other related materials. Qualitative methods will help to answer evaluation questions as well as to track Project outcome and output indicators not covered by quantitative survey.

The possible key informant groups are listed in the table below.

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| **Key Informants** |
| **Donor** |
| The EU Delegation to Armenia |
| **Project Grant Coordinator** |
| DVV International in Armenia |
| **Partner Organizations** |
| Association of Museum Workers and Friends NGO |
| Media Initiatives Center (MIC) |
| Armenian Center for Democratic Education-CIVITAS NGO |
| **Target groups[[6]](#footnote-6)** |
| 16 beneficiary CSOs that have received sub-grants during the project (8 pilot projects on tourism, 6 social entrepreneurship projects, 4 social entrepreneurship research projects) |
| 4-5 co-applicant CSOs from Gegharkunik, Kotayk and Shirak regions |
| 6 Museums involved in trainings and content development  |
| School students and teachers involved in the Project  |
| **Other Stakeholder and Beneficiaries**  |
| Residents of targeted regions, clusters and communities, school students and youth, those who benefited from the project in the long term at the level of the society or sector at large (e.g., participants of the trainings by CSOs).  |
| Representatives of local/regional administrations |
| Multi-stakeholder group representatives  |
| Other, such as experts, trainers, consultants involved in the Project implementation  |

**Tasks to be Accomplished and Timeframe**

The evaluator is responsible for designing data collection tools, including questionnaires, interview and focus group guidelines and other relevant instruments. The research instruments should be tailored for each informant group specifically.

The evaluation approach and data collection and analysis methods should integrate EU’s gender, human rights and environmental perspectives. Data will be analysed in a gender disaggregated manner. This includes both disaggregated quantitative data as well as qualitative information. Gender equity and human rights considerations will be further elaborated by the evaluation team during the inception phase and addressed throughout the final report and presentation.

The evaluation is expected to start between February 20-March 5th, 2021 and complete before April 30th, 2021. The evaluation timeline may be extended for one additional week in the event of unforeseen circumstances and upon request of the evaluation team.

|  |  |
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| **Tasks** | **Timeframe** |
| *Evaluation Design and Inception Report* * Desk review of available documents and materials, compilation of background information
* Development of evaluation methodology, including refined evaluation questions and final methods selection
* Identification of key informants and stakeholder mapping
* Review of quantitative instrument and development of interview/fg guides

An inception report summarising the tasks above should be submitted as deliverable #1.  | 2 weeks following the signing of the contract  |
| *Fieldwork* * Data collection through quantitative methods
* Data collection through qualitative methods
* Organisation of collected data and preparation for the analysis

A field work report should be submitted as deliverable #2  | 4 weeks following the signing of the contract |
| *Analysis and development of the draft report** Analysing collected data, disaggregating by gender and other parameters and integrating the findings through triangulation.
* Debriefing with DVV/EU and drafting the initial report

Draft report should be submitted as deliverable # 3 | 6 weeks following the signing of the contract |
| *Final report and presentation** Finalizing the report by addressing the comments by DVV International, EU and other relevant stakeholders.
* Preparing and delivering a presentation on main findings, insights and recommendations.

Final report should be submitted as deliverable # 4  | 8 weeks following the signing of the contract |

**Deliverables and payments**

The deliverables requested from the evaluation team are presented in the table below with their payment tranches.

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| **Deliverables** | **Payment** |
| Deliverable 1. Inception report (including methodology, workplan, data collection instruments) | First payment  |
| Deliverable 3. Draft evaluation report  | Second payment |
| Deliverable 5. Final evaluation report and presentation file | Final payment |

**Supervisors**

The evaluator will report to EU4Culture Project coordinator, DVV International Armenia Country Director and respective EU staff.

**Requested Services**

DVV International seeks the services of ***an evaluation company or a team of consultants*** to conduct the evaluation of EU4Culture project. Required qualifications are the following (selection criteria based on the below qualifications is included in the Contract Notice):

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| **Evaluation company** | **Team of consultants** |
| 1. At least 3 years of extensive experience in designing and conducting evaluations, studies and other research, analysing qualitative and quantitative data and developing reports
2. Experience of working with CSOs in Armenia
3. Availability of relevant staff, including

*A team lead, that has*1. Advanced university degree in Sociology, Anthropology, Public Administration, International Development, or a related field
2. High analytical and conceptual skills and ability
3. Fluency in written and spoken English.
 | * At least 3 years of extensive experience in designing and conducting evaluations, studies and other research.
* Experience of conducting quantitative surveys and qualitative interviews and producing reports
* Advanced university degree in Sociology, Anthropology, Public Administration, International Development or a related field
* Good analytical and communication skills, fluency in written and spoken English.
 |

**Application procedure**

Interested evaluation companies and individual consultants are requested to send their applications to info@dvv-international.am and asryan@dvv-international.am by **January 15th, 2021** mentioning *Evaluation of EU4Culture Project* in the subject line. The application package should include:

* CVs of team members
* Recorded evidence of similar evaluations, studies and research conducted by the team lead
* Implementation Plan of the assignment
* Financial proposal (an initial indicative budget[[7]](#footnote-7) for completing the assignment)
1. January 31, 2021 is the official end date of the Action. However, most probably a no cost extension will be granted by the EU for three additional months due to the Pandemic and war situation. [↑](#footnote-ref-1)
2. DVV International has applied for a three month no cost extension. If the latter is granted by the EUD, this timeframe may change slightly. [↑](#footnote-ref-2)
3. OECD DAC Network on Development Evaluation. (2019). Better Criteria for Better Evaluation: Revised Evaluation Criteria, Definitions and Principles for Use https://www.oecd.org/dac/evaluation/revised-evaluation-criteria-dec-2019.pdf [↑](#footnote-ref-3)
4. European Commission. (2017). Better Regulation Toolbox. Evaluations and fitness checks, Tool #47, Evaluation criteria and questions, https://ec.europa.eu/info/sites/info/files/file\_import/better-regulation-toolbox-47\_en\_0.pdf [↑](#footnote-ref-4)
5. The selected evaluator/team should review the baseline and propose its approach to follow on survey. Some of the baseline calculations might need to be revised. [↑](#footnote-ref-5)
6. The list of targeted CSOs and museums will be provided to the winning bidder. [↑](#footnote-ref-6)
7. The overall budget for the evaluation is up to 10,000 Euros. [↑](#footnote-ref-7)