## Internal Midterm Evaluation

**Terms of Reference**

**Project Title:** Taking Action on Social Inclusion of Older People (TASIOP)

**Counties:** Albania, Bosnia and Herzegovina, Macedonia, Montenegro and Serbia

**Project Number:** Europe Aid 2015/370-287

**Name of Partners:** Red Cross of Serbia, Albanian Association of Geriatrics and Gerontology, Association Humanost – Macedonia, Red Cross of Macedonia, Association OSMIJEH – Bosnia and Herzegovina, Red Cross of Montenegro, Österreichisches Rotes Kreuz

# 1  Background

The ageing of population is a prominent phenomenon across most of Europe. The effects of population ageing are different from country to country in terms of how the society accommodates to a changing demographic structure. However, commonly older people are excluded from decision-making processes at all levels and they have an image problem too. The three-year project *Taking Action on Social Inclusion of Older People* coordinated by the Red Cross of Serbia is supported by European Union through its IPA fund, the Austrian Red Cross as well as the Austrian Development Agency. It started in February 2016 in the Western Balkans, including the countries Albania, Bosnia and Herzegovina, Macedonia, Montenegro and Serbia and can be considered a regional effort to put older people's fate back in their hands, support them in being better included in their communities and discuss the topics of importance with decision makers and community leaders.
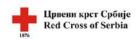In order to achieve results, the main aims of the project are to
- Strengthen and widen networks of civil society organisations in Albania, Bosnia and Herzegovina, Macedonia, Montenegro and Serbia and to improve their ties to the communities and facilitate social inclusion of older people in local communities and the society across the region.
- Encourage and support older people to take part in decision-making processes related to ageing and older age at local and national levels through offering knowledge and transfer of good practices.
- Change the public perception of older people through engaging the public via targeted advocacy campaigns and working with the media on better understanding of the demographic realities and individual strengths, capacities and contributions of older people across a range of ages, geographic areas and social classes.

An initial set of indicators has been identified during the project development phase to monitor the achievement of these expected results and goals. It is documented in the logical framework matrix and the activity plan of the project document (see Annex 3).

At this stage, the TASIOP project has been implemented half the period of its implementation. The majority of activities are completed within the planned timeframe, in particular:
- The project countries have functioning and active civil society networks with a total number of 50 active CSOs across the five countries (List see Annex 5).
- Summarized strategic documents of each network were compiled in an inception report (Annex 4).
- All the civil society networks in the project countries have had two national meetings, following the kick-off meetings in each country to present project objectives and allow to civil society partners to ask questions and express their interest in further participation.
- The communication with stakeholders, national and international partners increased by devising a set of six websites to provide information on the project activities as well as other activities of national CSO networks, supplemented with the quarterly project newsletter.

- Preparatory activities for five national research studies that will be completed in the first part of the second year have also been completed.

# 2  Evaluation Purpose

The purpose of this evaluation is to **analyse the progress and performance** of the project as compared to the project document, logframe indicators and situation analysis framework, in general.

This shall serve to **develop lessons learned and provide recommendations** for improvement of processes and methods used in the project implementation, to coordination, management and planning of activities during the second part of the project period and future project in this field.

The evaluation is an **internal process involving all project partners and project related stakeholders**, including national government, ministries, local government entities, media, public service providers and others, as defined by each national coordinator. The analysis within this evaluation shall, at all stages be carried out in cooperation and consultation with the main stakeholders.

# 3  Evaluation Objectives

The **general** objective of the evaluation is to identify and describe the project performance through measurements of the changes towards the indicators set in the logical framework matrix (Annex 3).

**Specifically** the evaluation aims to assessing the project progress, relevance, effectiveness, impact and sustainability towards the national CSO networks on social inclusion of older people.

As an **outcome** of this evaluation, it is expected to summarize the project performance so far, experiences gained, and recommend the most effective approaches and methodologies by identifying and describing the main lessons learned in terms of the above mentioned objectives.

This will be particularly **relevant for** the project partners, the member organization of the national networks and the project management of the RC of Serbia in view of next steps, relevance of their activities, direction and improvement. In addition, the evaluation´s outcomes explaining the relevance of the project activities and successful approaches towards their implementation can be used for the development of future projects. It will be relevant for networking, lobbying and relationship building with relevant future partners, stakeholders or donors.
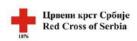
The evaluation is carried out at the **mid-point** of the project in order to allow implementation of possible recommendations for improvement or change in processes, methods or direction during the second part of the project period.

# 4  Evaluation Scope and Main Evaluation Questions

This internal review will focus on all five evaluation criteria, namely relevance, effectiveness, efficiency, impact and sustainability.

The **first part of the analysis will focus on the overall project performance and efficiency** through the measuring the validity of set indicators from the logical framework with focus on
  a) the extent to which the project has already achieved planned results and the efficiency or utilisation ratio of the resources used.
  b) strengths and weaknesses in terms of planning, management, implementation and monitoring.
  c) the appropriateness of the indicators for monitoring purposes and to what extent they are being used by the project management.

The **second part of the analysis will specifically analyze the main focus of the project by measuring the relevance, effectiveness, impact and sustainability** of the national CSO networks on social inclusion of older people by assessing

    a) the mobilization of national CSO networks on social inclusion of older people.

    b) the capacity-building of CSOs participating in the national network in general and their capacities to engage in policy- and decision-making processes concerning social inclusion of older people at national level (and regional level in Western Balkan countries).

    c) the effect the networks have on participating organizations to cooperate more closely with other actors in the field of social inclusion of older people.

    d) the sustainability of the networks and requirements to continue after phase out of the project

**Target group for the evaluation:**

- Project partners and all CSOs/network members
- Relevant stakeholders as defined by the national project and network coordinators (e.g. including relevant ministries related to social inclusion of older people, local and regional government entities, media, public service providers, older people who will be directly reached through citizen education activities, UN/UNFPA offices, other key international organizations, etc.)

**Geographical area:**

- The evaluation will take place in all five countries where the project is implemented.

# 5   Main Evaluation Questions

### 1) Overall project performance and efficient use of resources

- Are the goals of the initiative achieved within the set timeframe?
- Are the objectives being achieved within the planned budgetary boundaries?
- Are the set indicators applicable for monitoring purposes and used by the project management?
- Are there any strengths and weaknesses in terms of planning, management, implementation and monitoring observed?

### 2) Relevance, effectiveness, impact and sustainability of the national CSO networks

- Has the existence of the networks increased the awareness/**relevance** of social inclusion of older people in the country?
- Has the process of the mobilization of national CSO networks on social inclusion of older people been **effective**/successful in terms of creating active networks in each country?
- Have the networks had an **effect** on participating CSOs to cooperating more closely with other actors in the field of social inclusion of older people?
- Have the networks had an **impact** on the capacity-building of CSOs participating in the national network in general?
- Have the networks had an **impact** on improving the CSOs capacities to engage in policy- and decision-making processes concerning social inclusion of older people at national level (and regional level in Western Balkan countries)?
- How is the **sustainability** of the networks measured and what is needed to increase probability of the continuation of the networks after phase out of the project?

# 6   Evaluation Approach and Methodology

The evaluation will be carried out according to evaluation standards of the AutRC (Annex 6) by a team consisting of **local consultants, the implementing partners, RCS and AutRC Headquarters** staff. It will be carried out as a **self-evaluation** with participation of all partners and member organizations of the national networks.

The evaluation will be based on the **findings and factual statements** identified from review of relevant documents including the project document, quarterly operational reports of network coordinators and

project manager and biannual financial reports, 1st interim narrative report to the EC, evaluation reports of trainings and any other documents like minutes from partner meetings or Skype meetings, if relevant. Further reference shall be made to the situational analysis undertaken in the beginning of the project, which is part of the Inception report submitted to the EC, three months after project inception.

**Participation** of project stakeholders as defined by the national project coordinators in the evaluation should be maintained at all the times, reflecting opinions, expectations and vision about the contribution of the project towards the achievement of its objectives.

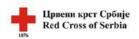For the purpose of obtaining the required information, the team will
- hold an **evaluation meeting** between RCS and AutRC to assess the achievement of results and indicators from the logical framenwork.
- undertake a review using a **standardized questionnaire** (Annex 1), with help from project partners and network members (List see Annex 5).
- carry out **focus group discussions** with national stakeholders as defined by the national project coordinators by local consultants hired in each country to (see Annex 2 for discussion guidelines).
- The draft evaluation report will be discussed with all partners and coordinators of the national networks during a feedback seminar. One report compiling national results will be developed.

# 7 Proposed Timeline

**Duration:** The internal evaluation will be carried out during a period of 3 months between September 2017 and November 2017.

**Workplan:**

| What | Who | When |
|------|-----|------|
| Finalisation of ToRs, questionnaires for CSOs and partners for the mid-term evaluation and uiding questions for focus group | AutRC together with RCS and partners | Beg. September 2017 |
| Evaluation meeting between RCS and AutRC – Logical framework activity analysis, Review of indicators | AutRC, RCS | 6-8 September 2017 |
| Translation of questionnaires into partner languages | Partners | Mid September 2017 |
| Questionnaires to CSOs (network members) and partners | AutRC, partners | Mid September 2017 |
| Consultancy tender | AutRC, partners | Mid September 2017 |
| Procurement and hiring of consultants | AutRC, partners | End September 2017 |
| Definition of focus group representatives | Partners, consultants | End September 2017 |
| Focus group discussion with relevant stakeholders in partner countries | Consultants | Mid October 2017 |
| Analysis of results from discussions in form of: <br> 1) a short report/statistical analysis from questionnaires <br> 2) summaries from the focus group discussion in each country | Consultants | End October 2017 |
| Compile draft evaluation report | AutRC | Beg. November 2017 |
| Conduct feedback workshop | AutRC with partners | 13-14 November 2017 |
| Final Evaluation Report | AutRC | End November 2017 |

# 8   Deliverables, Reports

The local consultants shall provide AutRC with an analysis of results in form of:
- A **short report/statistical analysis from the questionnaires** to the project partner and network members. (English language, max. 2 pages)
- **Summaries from the national focus group discussion** in each country. Each of those summaries shall be in form of a small evaluation report including the following chapters (English language, max. 5 pages):
  - Executive summary.
  - Methodology applied and questions asked.
  - Main findings based on the criteria set out in the key questions.
  - Conclusions and recommendations for the next phases of the project.
  - Annexes if any

Out of the analysis documents provided, AutRC will compiled in form of:
- A **draft evaluation report** for review and comments by all project partners (10-12 pages):
- A **final evaluation report** taking into consideration additional input on the draft report from all project partners (max. 15 pages). Both reports shall be provided in the following format:
  - Executive summary
  - Purpose of the evaluation and the methodology applied
  - The main findings based on the objectives and scope set out above.
  - Lessons learned on operational and developmental levels based on the assessment of attainment of objectives and project indicators.
  - Conclusions and recommendations for the next phases of the project.
  - *Annexes to report:* ToR, Questionnaires, Guidelines for Focus Group discussions, List of people interviewed, List of documents reviewed, etc.

# 9   Evaluation Team & Qualifications

The evaluation process is carried out under the overall guidance of the **AutRC** SEE Desk Officer, TASIOP project partner and counterpart at AutRC Headquarters.
- to coordinate all activities of the evaluation, including the timing, budget, and quality of analysis.
- analyze activities and results and the logical framework together with project lead organization RCS
- compile a draft evaluation report from the separate national reports by consultants
- conduct a feedback workshop and finalize the evaluation report
- compile a final evaluation report

In its leading role **RCS** will assist the AutRC officer in
- gathering information on status of activities and results as well as indicators in the logframe.
- to set-up the feedback workshop, supposed to take place in Belgrade, Serbia, in order to enable participation of all partners.

**National project/network coordinators** in all partner countries will be closely cooperated with regarding
- distribution of the internal questionnaires
- provision of answers to the internal questionnaire themselves
- selection of local consultants
- setting-up of the focus groups and discussions in cooperation with the local consultants.
- provision of feedback from their own experiences in the project and towards the outcomes of the evaluation

The **local consultants** to be recruited should have the following key qualifications:

- Relevant academic degree (master level) in social science
- A minimum of three years' experience and expertise in the field/sector of consultancy services and project/program evaluations
- Participated in at least two evaluations ideally in the relevant field in the last five years.
- Knowledge of the country for which the local consultant is hired.
- Knowledge of the local language is essential.
- Experience and expertise in evaluating cross-cutting issues.
- Experience in social science research methods.
- Oral and written English skills (state other language too, if applicable)
- Sound MS Office and IT skills

# 10 Coordination/Responsibilities

**Project Coordinators**

Albania:                             Alban Yili: albanylli@yahoo.co.uk
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**Network Coordinators**

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# 11 Annexes

**Annex 1:** TASIOP mid-term review Questionnaire for partners and network members
**Annex 2:** TASIOP mid-term review Guidelines for focus group discussions
**Annex 3:** TASIOP Program document, Logical framework and Activity Plan
**Annex 4:** TASIOP Inception report
**Annex 5:** TASIOP First Interim report to the EU
**Annex 5:** TASIOP List of CSOs in national networks
**Annex 6:** AutRC Evaluation Guideline
**Annex 7:** AutRC Mission Statement International Aid
**Annex 8:** Code of Conduct and AutRC – Rules and Regulations