

# Terms of Reference

## Final Evaluation of the Accountability and Fulfilment for Older Persons to Raise their Dignity Programme - AFFORD II (2017-2022)

### 1. Background

HelpAge International ([www.helpage.org](http://www.helpage.org)) is the secretariat to the HelpAge Global Network, which brings together a wide range of organisations and individuals working together to ensure that older people lead dignified, active, healthy and secure lives. HelpAge International is managing a six-year (2017 to 2022) multi-country **Accountability and Fulfilment for Older Persons to Raise their Dignity Programme (AFFORD II)**, a social protection programme, funded by Irish Aid. The AFFORD II programme is being implemented in four countries, namely Ethiopia, Malawi, Mozambique and Tanzania.

### 2. Programme Goal

The goal of the AFFORD II programme is to enable older women and men in four targeted African countries to lead a more dignified, healthy, secure and resilient lives. The programme is built on the understanding that social protection is crucial to achieve these goals, and that enhanced accountability of Governments and implementers to older people, as well as the empowerment of older people to claim their rights, are requirements of the development of inclusive, effective and rights-based social protection systems.

Within the AFFORD II programme, social protection is the system consisting of policies, mechanisms and actions by which Governments and other players in the programme locations provide regular income in the form of social cash transfers to older women and men as part of their commitments to protect older people against age-specific and other risks that threaten their wellbeing and security in older age.

The programme has three objectives, namely:

- **ACCESS:** Older women and men in the targeted countries, including the most marginalised, benefit from increased access to nationally appropriate, inclusive and effective social protection systems.
- **ACCOUNTABILITY:** National social and health protection policies, public governance systems and structures at all levels are more responsive and accountable to older women and men's rights and needs.
- **VOICE:** Civil societies and their networks, communities in the programme areas demonstrate more supportive attitudes and actions to promote the voices of older men and women in attainment of their rights and entitlements.

### 3. Purpose of the Evaluation

The purpose of the exercise is to evaluate the **relevance, effectiveness and sustainability** of the AFFORD II Programme in contributing to the development of inclusive, effective and rights-based social protection systems in Ethiopia, Malawi, Mozambique and Tanzania.

### 4. Evaluation Objectives

- To assess if the programme achieved its intended objectives and identify factors that may have contributed to its successes and challenges.
- To assess whether the anticipated chain of results/causal pathways in the theory of change occurred.

- To review the extent to which the programme was relevant to beneficiaries, partners, and governments across the four countries.
- To assess the extent to which the programme’s strategies contributed to policy changes which benefit older people and their communities across the four countries and the region.
- To assess the contribution of the programme’s strategies to changes/improvements to the design, implementation and financing of social protection systems and programmes of these 4 countries.
- To document lessons learnt from the programme implementation, successful approaches, key challenges and recommendations for future work on social protection (including shock-responsive social protection), accountability and older people.
- To assess whether, and to what extent, benefits generated by the programme, and activities initiated, are likely to continue after the end of this programme.

## 5. Evaluation Questions

### *Relevance*

- To what extent the objectives and the interventions of the programme responded to the needs of older women and men, including those with disabilities?
- To what extent the objectives and the interventions of the programme fit/complement partner organisations’ work?
- To what extent the objectives and the interventions of the programme were relevant to policy makers, and to the development/improvement of national/regional ageing and social protection policies and strategies?
- To what extent is the project theory of change representative of how change happened within the programme? Were the causal pathways and underlying assumptions valid?
- To what extent has the programme adapted its approach to specific country contexts? How similar/different was the project approach across the four countries? Was there cross fertilisation of ideas/approaches across countries?
- To what extent did the regional and national components of the programme complement and support each other?
- To what extent was the programme adapted in response to lessons learned from implementation of the intervention across the different countries?
- To what extent was the programme adapted in response to changes in context due to the COVID-19 pandemic and other major crises? Are there specific lessons in relation to how social protection interventions can be adapted/used to respond to shocks and crisis?

### *Effectiveness*

- To what extent have the expected outputs and outcomes been achieved or are likely to be achieved in relation to programme objectives and its results framework?
- To what extent can changes/progress since 2017 related to the areas below be attributed to programme? What has been AFFORD’s role in bringing about these changes? Which approaches worked particularly well?
  - Strategies, legal and policy frameworks related to “older people” and “social protection” at country and regional levels.
  - Changes/improvements in the design of social protection programmes which increased adequacy, coverage and age-sensitivity of programmes and/or improved accountability.
  - Number of older people benefiting from social protection programmes (TASAF in Mbarali district in Mbeya region in Tanzania mainland, Zanzibar Universal Pension Scheme in Zanzibar, PSSB in Mozambique, Urban Productive Safety Net Programme (PSNP) in Ethiopia, and Social Cash Transfer Programme (SCTP) in Blantyre and Balaka districts in Malawi).
- How effective have Older Persons Associations (OPAs) and Older Citizen Monitoring Groups (OPMGs) been in improving accountability/access to social protection/promoting older

peoples' voices? Were they particularly effective in a specific contexts/for particular groups/or vis-à-vis specific social protection systems? Were there similarities/variations of performance across countries?

- In which areas (geographic, components, issues) does the programme have the greatest achievements? Why and what have been the supporting factors?
- Which approaches/strategies/components of the Programme were less successful? Why?
- What have been the programme greatest achievements in relation to improving access of older people (including older women and older people with disabilities) o social protection?
- What have been the programme greatest achievements in relation to improving accountability to older people (including older women and older people with disabilities) within social protection systems?
- What have been the programme greatest achievements in relation to improving the quality (age-appropriateness, regularity, adequacy, comprehensiveness etc.) of social protection provided to older people (including older women and older people with disabilities)?
- How well have resources and inputs (funds, expertise, time, etc.) been allocated or used strategically to achieve the expected results?

### **Sustainability**

- To what extent are the programme interventions likely to be maintained or even scaled-up and replicated by partners and/or other organisations (including government) after major assistance has been completed?
- To what extent did the programme build the capacity of local partners?
- How are OPAs/OPMGs likely to continue working after the completion of the Programme?
- To what extent has the programme developed scalable and replicable models that can be used for future programming?
- To what extent are the results of the intervention likely to have a long term, sustainable positive impact on older men and women and their communities?

### **Scope: Area**

The evaluation will be conducted in four countries namely Ethiopia, Malawi, Mozambique and Tanzania, and will also review the regional aspects of the Programme.

### **Scope: Beneficiaries/respondents**

Key stakeholders and partners who played a critical in the exercise will include but not limited to the following:

- **Ethiopia:** Ethiopia HelpAge Country Office, Ethiopia Elderly and Pensioners Association (EEPNA).
- **Malawi:** Malawi Network of Elder Persons Organizations (MANEPO).
- **Mozambique:** Mozambique HelpAge Country Office; APITE (Tete); ACIDECO (Manhica) and Anglican Church (Maputo and Xai Xai).
- **Tanzania:** Tanzania HelpAge Country Office; JUWAZA II (Zanzibar) and KIWWAUTA (Mbeya).
- Regional Programme Manager- Social Protection
- Relevant National and local levels government representatives
- Older Persons aged 60 years and above
- Older Persons Associations (OPAs) and Older Citizen Monitoring Groups/Older Persons Forum.
- International Labour Organisation (ILO), UNICEF and Donor Group for Social Protection National Platforms (SPNP)

## **6. Methodology and Specific Tasks for Consultants**

It is envisaged that the evaluation will adopt participatory approaches involving the use of mixed-methods. However, the consultants will propose and design a suitable methodology in line with the evaluation objectives and questions.

The consultants will among other things:

- Clarify the nature and scope of the task with HelpAge, by distance. The consultant may also be asked to respond to suggestions and feedback from HelpAge or its partners.
- Propose a structure for the report.
- Work closely with HelpAge country office and global thematic teams.
- Propose a methodology for the evaluation and a structure for the reports.
- Facilitate orientation meetings with HelpAge global and country level staff to clarify expectations and desired outcomes, review and confirm activity and logistics plans.
- Review programme monitoring data, reports and publications (baseline report, mid-term report, annual reports and routine monitoring).
- Review secondary sources, including databases, as required.
- Conduct field work in the four countries as per methodology proposed.
- Prepare at least one in-depth case study per target country to explore and document lessons learnt from the programme implementation. Each case study should focus on one particular approach, key breakthrough or achievement.
- Prepare draft evaluation reports (four country and one regional report) following agreed structure.
- Conduct debriefing meetings with implementers, partners, and other stakeholders to review preliminary evaluation findings.
- Finalize five Evaluation Reports (four country-level report and one overall regional/programme report which should bring together the country-level evaluations and an evaluation of the regional component to create a complete evaluation report for the programme).

## 7. Deliverables

In light of the above, the consultant(s) will submit:

- a) Inception Report detailing *inter alia* proposed methodology and work plan.
- b) Data collection tools: develop data collection tools and have them approved by HelpAge International and partners before data collection.
- c) Draft evaluation reports: the consultant will prepare 5 draft evaluation reports (4 country and 1 regional report) with details of findings, lessons learnt and recommendations.
- d) Case studies: produce four (4) in-depth case studies, one per country.
- e) Validation workshop: hold a validation workshop/meeting with relevant HelpAge programme staff and stakeholders to present and discuss findings.
- f) Revise the draft reports based on the feedback received.
- g) Final Evaluation reports: produce 5 final evaluation reports - four country-level reports and one regional/overall programme report.
- h) Provide HelpAge with electronic and hard copies of all data collected during field work.

## 8. Timeframe and Cost

The evaluation will begin in June 2021, however preliminary works may begin earlier such as development of the tools and review of the final evaluation study design.

**The total cost of the consultancy is expected to be around 45,000 EUR.**

HelpAge will cover the consultant's air tickets in economy class to the four countries (Malawi, Mozambique, Ethiopia and Tanzania), accommodation on bed and breakfast plus airport transfers

and in-country logistics including field activities. All other costs shall be borne directly by the firm/consultant.

Payment will be based on submission of deliverables that are satisfactory and have been assessed by the HelpAge team to be of good quality. Taxation laws will apply on the overall consultancy fee.

The following payments will be paid to the firm/consultant using an agreed mode of payment.

- 60% of the contract value after the submission and approval of the inception report.
- 20% of the contract value after the submission and approval of the Draft Evaluation reports (four country reports and one regional report).
- 20% of the contract value after the submission and approval of Final Evaluation Reports (four country reports and one report report).

## **9. Code of Conduct, Safeguarding, and other policies**

The firm/consultant will be working on behalf of HelpAge and will be required to sign and adhere to the Code of Conduct, Safeguarding Policy. Equal Opportunities and Dignity at Work policy, Data Protection policy and Security policy and guidelines and ethical guidelines. The consultant will also be required to attend mandatory training in any or all of these areas as required.

The consultant will be vetted prior to engagement and will be requested to provide information to enable HelpAge to undertake reference, identity, international sanction and right to work checks.

The firm/consultant will make clear to all participating stakeholders of all ages that they are under no obligation to participate in the exercise and that it is purely voluntary. All participants will be assured that there will be no negative consequences if they choose not to participate.

The firm/consultant must obtain informed consent from all participants. The firm/consultant must receive prior permission for taking and use of visual still/ moving images for specific purposes.

The firm/consultant will assure the participants of anonymity, confidentiality and will assure the visual data is protected and used for agreed purposes only. As regards the documentation, the title rights, copyrights and all other rights of whatever nature in any materials used or generated under the provisions of this consultancy will exclusively be vested with HelpAge International.

## **10. Qualifications and Experience Required**

1. Post-graduate degree in Social Sciences, Development Studies, Statistics, Public Engagement, Communication or related fields.
2. Minimum of 10 years' relevant professional experience in social sciences, social protection and research.
3. Strong background and experience in qualitative and quantitative data collection and analysis.
4. Proven experience in undertaking evaluation/research or leading evaluation/research teams, with outstanding skills in qualitative and quantitative research and data analysis using relevant software such as STATA, CPro or SPSS.
5. Technical expertise in evaluating social protection, social accountability, advocacy and rights programmes, and ability to draw strong and valid conclusions.
6. Excellent communication and report-writing skills.
7. Ability to travel to the target countries.

## **11. Submission of Technical and Financial Proposal**

All Expressions of Interest should include:

- **Letter of interest** addressing the survey criteria.
- **Technical proposal** (maximum 10 pages) including: brief explanation about the consultant/s with emphasis on previous experience in this kind of work; profile of the consultant/s to be involved in undertaking the study, understanding of the TOR, the study methodology, key contacts from similar work carried out.
- **Financial proposal:** The financial proposal should provide cost estimates for services rendered including professional fees (daily rates x number of days) and any other costs to carry out the assignment.

## **12. Submitting Expressions of Interest (EOI)**

All interested individuals/firms are requested to express interest by email to: **HelpAge-HR@helpage.org** by the end of **Thursday, 13 May 2021**. EOIs received by any other means will not be taken into consideration and any form of canvassing will lead to automatic disqualification.

Selection of the consultant will be undertaken by a panel and based on the experience of the consultant, the quality and relevance of the Expression of Interest, and the proposed budget (i.e. value for money, within resources available). Only shortlisted consultants will be contacted.

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