

# Roma Education Fund Beneficiary Assessment: General Facilitator Terms of Reference

## Introduction and Background Information

The Roma Education Fund (REF) was founded by the Open Society Foundations (OSF) and the World Bank in the framework of the Decade of Roma Inclusion in 2005. Its mission and ultimate goal is to close the gap in educational outcomes between Roma and non-Roma. In order to achieve this goal, the organization supports policies and programs which ensure quality education for Roma, including the desegregation of education systems. Starting in 2012 the Swiss Agency for Development and Cooperation have supported REF's interventions in the Western Balkans.

### Purpose

The Roma Education Fund is interested in outcomes and impact of REF grants as perceived by the direct beneficiary with a special focus on gender equality. This Beneficiary Assessment (BA) will answer the following questions, in addition the beneficiaries themselves will provide an additional 2-3 questions:

1. How do the beneficiaries perceive change in their life and how it happens?
2. How do the beneficiaries see REFs contributions to this change?
3. How do the beneficiaries observe REF interventions having an impact in gender equality?
4. Do the beneficiaries value REFs contributions to their development process?
5. What can REF do to insure programs respond to their priorities better?

The above five questions have the aim of addressing the following four global goals:

- REF and SDC learn how their investments are influencing change as perceived by the direct beneficiary of REF grants.
- REF and SDC learn from beneficiaries on if and how their approaches contributes to achieve the organizations missions.
- REF and SDC reflect and respond to beneficiaries needs, perspectives, and recommendations in program design and implementation.
- Empower and build skills in the beneficiary community.

### Scope

The Beneficiary Assessment will be conducted in two countries, Bulgaria and Serbia. In both countries the BA will answer the evaluation questions targeting the full range of REFs intervention models.

One to three localities per country will be specified for the beneficiary assessment. Localities will be targeted based on the range of REF project being implemented. For instance, if a locality in Serbia

has in the past or is currently implementing REF early childhood development, primary school, secondary school, and higher education; the single locality will be sufficient for the BA.

### REF Objectives

**Ensuring access to compulsory education**, for example, through the involvement of parents in education, initiatives to reduce dropouts, and provision of free textbooks and other educational materials.

**Improving the quality of education**, for example, through curriculum reform, introduction of Roma language teaching, anti-bias and tolerance teaching, and training of school mediators.

**Implementing integration and desegregation of Roma students** coming from segregated schools and classrooms and from special schools into mainstream schools, as well as **eliminating all segregated classes and schools**.

**Expanding access to pre-school education**, for example, through information campaigns, assistance with the registration process and work with parents to promote pre-school attendance.

**Increasing access to secondary, post-secondary and adult education**, for example through scholarships, adult literacy courses and career advice for secondary school students.

### Five Main Programs

**Project Support Program (PSP)** finances projects and programs of local civil society organizations (CSOs), municipalities or education institutions related to Roma education.

**Scholarship Program (SP)** funds tertiary education of Roma students.

**Policy Development and Capacity Building Program (PD and CBP)** and supports activities that help create a framework for dialogue with governments and civil society on education reform and Roma inclusion.

**Communication and Cross-Country Learning Program (CCCLP)** which includes activities to promote the exchange of knowledge on education reforms and Roma inclusion.

**Reimbursable Grant Program (RGP)** to help Roma NGOs and local governments access EU funds for the purpose of Roma education.

### Five Models of Intervention for Inclusive Education

REF's interventions and funding are based on the following models:

**Model 1 – Expanding Access to Preschool Education: Early Childhood Education (ECE).** The model aims to improve the school readiness and early childhood development outcomes of Roma children aged between zero to six by improving the enrollment and attendance in the mainstream ECE services; enhancing the parenting skills and improving the practices of Roma parents; strengthening the link between parents and preschool facilities; and raising the quality of ECE services, such as teaching and learning methods.

**Model 2 – Avoiding Early School Leaving in Primary Education.** The model intends to improve primary education outcomes, improve access to primary education, prevent early school leaving, facilitate the transition to secondary education and enhance parenting skills of Roma children aged between six and fourteen. It supports primary education enrollment and provides additional/remedial classes (school-after-school programs, tutoring and mentoring), strengthens the link between parents and schools, and offers professional support and guidance to school staff and authorities.

**Model 3 – Expanding Access to Secondary Education.** The secondary education model aims to improve the academic performance of students and to increase the retention and graduation rate of Roma secondary school students, and their transition to tertiary level. This is achieved through better outreach, provision of scholarships, school-based mentorship support and tutorship support. The secondary scholarship model is using a balanced triangulation provision of merit-based scholarships, and school-based mentoring and tutoring.

**Model 4 – Expanding Access to Higher Education: Romaversitas.** It aims to improve the retention, performance and graduation levels of Roma full-time tertiary education students. It provides them with individual and group academic tutoring and mentoring and help strengthen their Roma identity and community participation. This model consists of compulsory and optional/elective components and it serves as a bridge for young Roma scholars towards employment and active citizenship, by providing tailored needs training in professional development, IT, foreign language competences.

**Model 5 – Second Chance Programs for Adult Functional Literacy and Formal School Completion.** REF's adult education and training model aims to raise education attainment levels of Roma young adults with incomplete primary and/or secondary education. It provides them with tutoring and financial support for completing the adequate educational level. This model also aims to improve the literacy and social communication skills of illiterate and semi-literate Romani parents (mainly mothers) of preschool- and school-age children and enhance their involvement in their children's education through provision of non-formal literacy and social communication skills trainings.

## Methodology

Participatory evaluation methodology will be implemented in this beneficiary assessment. This methodology emphasizes empowerment and participation of direct REF beneficiaries in the evaluation design, process, and analysis. Through this methodology, REF and SDC will gain insight on the impact through the perspective of direct beneficiaries and community members. To gain a holistic perspective, the evaluation will focus on diversity in individuals that will participate and those that provide information. Bias is reduced through separation of roles throughout entire assessment.

The below methodological principles will be prioritized and implemented:

- Participation and Ownership
- Inclusion of Citizen/Beneficiary Perspective
- Representativeness of Citizen/Beneficiary Perspective
- Differentiation (disaggregation of viewpoints based on groups)
- Self-Critical Reflexivity on the quality of methodology
- Learning and Responsiveness

The assessment will at least meet the minimum criteria below:

- Enable REF and SDC to learn and report to beneficiary perspectives
- Beneficiaries and citizens can freely express their views and are listened to without interference from project staff and implementing partners.
- Different views are reflected as fairly and as reasonable possible in all aspects of the BA process.
- Response to the finding: REF demonstrates it has reported back to the assessors and assesses on the conclusions and rational of the response.

## Involvement of Citizen Observers

The focus of the BA is to hire former beneficiaries and local residence from the project target group as fieldworkers. The citizen observer roles include:

- Influence assessment questions
- Undertake data collection
- Aid in analysis
- Validate findings through meetings with local residence from the target group
- Supporting National Facilitator in organizing fieldwork

## Role and Tasks of the General Facilitator

The tasks and roles listed below are those for the general facilitator and identified by REF. There is flexibility to shift roles and tasks to the National Facilitator based on the profile of both the General and National Facilitator. Further, any changes in responsibilities must be approved by REF.

1. Coordinates and accompanies all sequences of the process BA
2. Contracts local National Facilitator in Bulgaria and Serbia.
3. Prepare and submit a study outline for the target country, which includes methodology, tools for data collection, ethical guidelines, etc
4. Leads, guides, and manages National Facilitators.
5. Conducts initial training of National Facilitators and citizen observers involved in the BA.
6. Implements the training of Citizen Observers (COs) with the assistance of the National Facilitator and methodological and organizing support from REF.
7. Leads the field testing and adjustment of the methodology.
8. Establishes together with the National Facilitator a detailed time plan for field implementation and complies with the established plan
9. Assures the correct application of the methodology and tools applied during field visits
10. Assures quality collection, translation and analysis of the information generated by the COs (respecting the views of the COs)
11. Captures important observations during the field phase (“what has been obviously seen but not said”).
12. Arrange for a photographer, to accompany the research team on one or two days of their research fieldwork Organizes (or coordinates organization?) and facilitates a general workshop to validate the results of the BA with involved actors.
13. Based on obtained and validated results elaborates a draft report, and final report
14. Draws lessons learned of the methodology applied (one chapter in draft report)
15. Ensure the delivery on time of the final report in English/Is responsible for keeping accounts of expenses and handling of funds for the implementation of the BA.

## Qualification of the Facilitator

The general facilitator will have the duties of managing field work within the two countries, facilitate and manage National Facilitator, insures quality and maintains standards, and ensures the delivery of the final product.

The general facilitator will need to sub-contract local consultants, NGOs, universities, or other organizations as the local National Facilitator to complete and manage local field work. Both the general facilitator and the National Facilitator must have prior experience in participatory evaluations or research.

The facilitator has the following skills and competences:

1. Proven experience in facilitating large and participative evaluations and/or research
2. Capacity to lead groups, field assessments and to facilitate workshops
3. Excellent communication and analytical skills
4. Proven capacity to analyze information derived from participatory processes

5. Proven capacity to document evaluation and systematization processes
6. Proven skills to writing reports of high quality (in English)
7. Experience in working with Roma communities and NGOs
8. Knowledge of the country context (assessment zones, social groups etc.)
9. Local language proficiency in the assessment team (assessment zones, social groups etc.)
10. Skills for coordination and organization

## Duration of the Consultancy

The facilitator will start their assignments in August, 2018 with an inception report and end with the delivery of the final report at the summer REF board meeting in 2019. The desk research and field work in Serbia is to be completed by December 2018. Fieldwork in Bulgaria will continue in with the start of the 2019 school calendar.

## Deliverables

Below are the deliverables that are required. Based on the awarded facilitators proposal, deliverables may be added.

1. Final inception report that includes
  - a. Methodology for implementation, which includes the assessment framework
  - b. Detailed timeline for field implementation which includes responsibilities and milestones
  - c. Data collection methods (workshop, survey, training, and focus group)
  - d. Data collection guidelines
  - e. Proposal for training of beneficiary citizen observers
2. Appraisal of field implementation
3. Report containing preliminary findings and analysis to present in validation workshops with beneficiaries and community members.
4. Final analysis of information based on validation workshop
5. Draft and final beneficiary assessment report
6. Presentation of beneficiary assessment report to the REF board
7. Written response to questions and requests of REF and SDC presented during presentation and review of the beneficiary assessment report
8. Support REF in providing a response to beneficiaries of the assessment findings and implications.

## Proposal and Selection Process

Please be aware that this call for proposals is for the general facilitator. Which can be one individual, a team, organization, or academic institution. If the applicant is more than one individual, please provide a CV for those that will be part of the assessment team.

### Process of submission

Interested bidders are required to submit a proposal and offer through email. If bidders require additional information, questions can be submitted through email.

### Applications must be sent to:

Marko Pecak at [mpecak@romaeducationfund.org](mailto:mpecak@romaeducationfund.org)

**The subject of the email must read:** Beneficiary Assessment (REF)

A complete submission must include the following:

- Proposal including methodology, data collection techniques, and process for development of findings
- Assessment plan with timeframe of how the study will be carried out
- Financial proposal
- This terms of reference
- Curriculum Vital of general facilitator and proposed team members

### Financial Proposal

Eligible applicants will be asked to develop an estimated budget that matches their proposal. REF will provide a template and must be submitted with the project proposal. The assignment should typically be performed in 20-25 full work days, not including costs and time associated with contracting the National Facilitator. Please include cost estimates for the tasks assigned to the National Facilitator in the financial proposal.