

PROFIRA 2-EASTERN REGION

IFAD/GOU Funding

Service Providers Contracted

(UWESO and COMVIS)

Terms of Reference for Eastern Region Household Baseline Survey

1. Objective of the Survey

The overall objective of the baseline survey is to provide reliable baseline information for the target areas in Eastern region which will be used as benchmarks against which progress of achievements, as well as impact, effectiveness and efficiency of the project will be measured and evaluated using verifiable indicators presented in the logical framework during the project implementation phase.

2. Scope and focus of the assignment

The consultant(s) will conduct both qualitative and quantitative analysis of the baseline data. It is intended that the baseline assessment will provide:

- (a) Baseline data for the project as benchmarks for Performance evaluation;
- (b) Information that will assist in designing the project's Monitoring and Evaluation plan
- (c) Developing training modules and capacity building interventions and
- (d) Information that will assist in identifying relevant policies, guidelines and frameworks for supporting project implementation and advocacy.

3. The specific objectives of the survey are;

1. Determine the baseline status on all indicators as established in the project's log-frame
2. To review the relevance, feasibility and targets of indicators established in the project's log-frame and provide recommendations on possible improvements
3. To provide a baseline understanding of CSCG and linkage banking.
4. To provide a baseline understanding of the role of women and youth in HH budgetary decision-making and resource allocation and recommendations for addressing barriers.

4. Methodology

- **Field work**

Primary data collection using quantitative and qualitative tools. The study will rely on questionnaire to generate qualitative and quantitative information.

- **Analysis and report writing**

The primary data will be triangulated among various sources and methodologies and will be crosschecked with secondary data. The study will involve various data analysis techniques: content analysis of secondary information, statistical analysis of household survey, and stakeholder trend analysis.

- **Validation**

The findings generated by the study will be presented to UWESO & COMVIS; its partners and relevant other stakeholders, which can include (local) government representatives and community representatives, for validation prior to completion of the final report.

5. Tasks

1. Conduct preliminary meetings with key project staff of UWESO & COMVIS and partners to clarify the ToR and develop a clear understanding of project design and methodologies.
2. Obtain feedback on data collection tools from key UWESO & COMVIS partners and staff and finalize data collection tools.
3. Undertake data processing (data entry, verification and analysis);
4. Produce and submit first draft report based on findings
5. Present findings and recommendations for validation to key stakeholders UWESO & COMVIS, partners and community representatives
6. Finalize the baseline report incorporating feedback and submit the final report.

6. Milestones & inputs

Review of project documents and understanding the project contextual frame work
Data collection
Analysis of data
Preparation of preliminary report
Revisions and preparation of Draft report
Compilation and submission of Final report

- **Approach and Methodology**

The approach will be mixed, including the consultant's personal experience, review of similar tools and frameworks, interaction and interviews with UWESO & COMVIS staff and other stakeholders. The consultant will be answerable to the project coordinator.

7 Consultancy Deliverables

- Electronic files with all raw data on 2 CDs.
- Hard copies of final report
- Electronic copies on CDs of the final baseline survey report

The consultant is expected to produce a draft and final report in English not exceeding 20 pages in length (excluding annexes) identifying key findings, conclusions, recommendations and lessons for the current and future operation. The report will have the following structure:

- Executive Summary (max. 1 pages)
- Introduction.
- Methodology, including sampling.
- Analysis and findings of the study.
- Conclusions, recommendations and best practices.
- Annexes 1 Performance indicator tracking table reflecting the status on each indicator against target and previous results, if any
- Revised log-frame, including benchmarks for the project duration (if relevant)
- M&E plan, including monitoring data collection methods and tools to be used, proposed timelines for data collection and a beneficiary and indicator tracking database
- Relevant maps and photographs of the study areas
- Bibliography of consulted secondary sources
- Finalized data collection tools (in English, ateso, Lugishu, Kuman)
- List of key informants
- Raw data in an agreed format

The consultant is expected to produce 4 hard copies of all deliverables. The final report will also be provided in electronic copy (both PDF and MS Word format) via email and on a CD.

8. Timeframe and Management

The baseline survey exercise will be managed by the Monitoring and Evaluation Specialist specifically. A steering committee will be established to help guide the work of the consultants with emphasis on validating the findings and considering the utility of the proposed mapping as outlined in the draft ToR. The exercise will be conducted by a Senior Consultant and a Research Analyst between May and June 2019.

9. Responsibility of UWESO & COMVIS

UWESO & COMVIS will on the other hand provide all the relevant information, financial support and back-up man-power (from the **UWESO & COMVIS** field team) required by the consultant(s) to undertake the assignment. The assignment will last for 60 days including report compilation.

10. Reporting.

The Consultant will work closely with the Monitoring and Evaluation Specialist (Overall supervisor) and other PROFIRA project staff as required. The Consultant should first submit a draft reports in electronic copy for review as per the agreed schedule. The project team will review it and provide comments/inputs/feedback/suggestions to the Consultant. The Consultant will incorporate them and submit the final version of the report electronically as well as hardcopies within one week of receipt of the comments/inputs/feedbacks/suggestions. In addition to the report, the consultant will also submit raw data to UWESO & COMVIS for further references/analysis.

The consultant will be responsible for all aspects of the review, including sampling, designing data collection tools, coordinating data collection in the field, ensuring quality of data, analysing quantitative and qualitative data. Note: The work will be reported ONLY in English language

11. Selection Criteria

The selection process will take the following into account:

	Selection criteria	Weight
1.	CV Details and proven experience Of a firm in carrying out similar Assignments PROFIRA two reports	35%
2.	Understanding of the Assignment	5%
3.	Innovations to the Approach and Cost effectiveness	5%
4.	Professional and Analytical Presentation skills	5%
5.	Experience to handle semi trained participates	15%
6.	Cost	35%

12. Consultants Profile

The study requires a consultant(s) with proven experience in project monitoring and evaluation studies and how the CSCG methodology works. Key management and technical personnel with a BA/B.Sc or above in sociology, economics, rural development or related field and ten or more years of working experience is required, particularly in the microfinance/community microfinance sector.

- Proven expertise in designing and conducting qualitative surveys including and evaluation of projects;
- Experience in the use of participatory appraisal techniques in data collection;
- High level skills in project development, management, and evaluation;
- Proven ability to liaise with provincial and local authorities, NGOs, development agencies and groups participating in the VS&L intervention;

- Excellent knowledge in using statistical data analysis software (SPSS, STATA, SAS, etc.);
- Familiarity with survey data codification and software or any other relevant software;
- A high level of spoken and written English, and the ability to speak other local language will be an added advantage;
- He/she must have profound knowledge in financial and economic analysis of development projects;
- Familiar with issues related to livelihoods, income generating activities, entrepreneurship development and community capacity building;
- Familiarity with issues related to organization management, and micro credit;
- Familiarity with current issues in micro finance industry and business community development;
- Well-versed with gender-sensitive; gender-responsive and gender-transformative approaches in the international development sector
- Previous work experience in similar evaluation studies at national and international levels;
- Previous experience of evaluation of the effectiveness of training packages will be particularly valuable.
- Strong understanding of how partnership works in achieving development objectives

13. Consultant Team Composition and Required Competencies

- Qualified individuals or institutions (consultancy, firms, etc.) that have the capabilities to meet the following requirements, and are available for the period indicated, are invited to submit an application.
- **One Senior Consultant** with the overall responsibility for providing guidance and leadership, coordinating the analysis.
- The Senior Consultant will be responsible for delivering all the outputs outlined in this ToR.

14. The Senior Consultant will have the following qualifications:

- Extensive experience (>7 years) in relevant professional field including financial inclusion services policy and research, CSCG program management in relevant areas;
- A strong team leadership and management track record (≥5 years' experience) in financial inclusion program design, management, monitoring and/or evaluation;
- Strong evaluation experience (>5 years) in relevant program contexts using mixed methods;
- Familiarity with IFAD/GOU PROFIRA's country-level operations is a benefit;
- A strong commitment to delivering timely and high-quality results;
- Good communication and people skills; ability to communicate with various stakeholders and to express concisely and clearly ideas and concepts in written and oral form.
- Demonstrated skill in managing and analysing large information bases; Demonstrated skill in conducting interviews with a variety of stakeholders;
- Demonstrated skill in the depiction of data via info graphics, etc....for use in mapping matrices and other products.

15. Consultancy Work Proposal Specifications

Interested consultants for this assignment must submit a detailed technical and financial Proposal. The technical part should include the following components:

- Description of the assignment as understood by the consultant(s)
- Approach and methodology to be used in undertaking the assignment
- Detail implementation plan
- Organizational and personnel capacity including profile of key personnel
- Experience of similar assignments.
- CVs of intended team members
- Any other relevant information to the assignment

The financial part of the proposal should include a summary of the prices and detailed breakdown of each cost item.

Where to send applications: please send your applications and proposal addressed to

**CHIEF EXECUTIVE OFFICER
UWESO & COMVIS PROFIRA TEAM LEADER**

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Not late than 18th May 2019