



STATEMENT OF WORK FOR PERFORMANCE EVALUATION OF USAID ROMA EDUCATION PROJECT (REP) IMPLEMENTED BY THE FOUNDATION OPEN SOCIETY - MACEDONIA

I. SUMMARY

The Foundation Open Society Macedonia (FOSM) seeks the services of a Contractor/Evaluator to perform a final performance evaluation of the USAID-funded Roma Education Project (REP). The evaluation should be carried out in the period **April-September, 2013**.

II. BACKGROUND

The Foundation Open Society - Macedonia (FOSM) is part of the Soros Network in Central and Eastern Europe. Founded in 1992, FOSM promotes and supports open society across program areas of education, law, public administration and local self-government, civil society, public health, information and media. FOSM implements a range of initiatives varying from capacity-building to policy and social advocacy projects. Responding to different needs of various target groups, especially youth, Roma and SMGs, FOSM cooperates with other NGOs, international institutions and donors in undertaking actions that foster sustained democracy.

Since 2001, USAID has been implementing programs addressing all levels of the education system from pre-school to university. These programs have focused on six key areas: 1) strengthening students` core skills and critical thinking, 2) equipping over 10,000 teachers with modern methods, 3) provide older students with practical business skills, 4) increasing access to Information and Communication Technology (ICT), including activities that earned Macedonia the title "First Wireless Country in the World", 5) providing educational support to disadvantaged Roma students, and 6) establishing South East European University, the first multi-ethnic, multi-lingual university in the region.

The REP project was initiated in July, 2004 to conduct a comprehensive education support that will help Roma students remain in the school system and improve their school performance through positive interventions at all levels of education (from pre-school to university). It is a ten year (2004 – 2014), \$ 4.5 million project, implemented by the Foundation Open Society - Macedonia (FOSM) in cooperation with the Step by Step Foundation and four Roma Educational Centers (RECs), established and run by local NGOs: "Vrama Si" and "Kham" from Kumanovo, "Aid for the Handicapped and the Poor" from Prilep and "Dendo Vas" from Skopje (pre-school and primary school component). FOSM runs the secondary education and the university component and is responsible for overall implementation of the program.

Roma represent 2.66% of the total population in Macedonia (cca 54,000) and are the most socially and economically disadvantaged ethnic group. Over 88% of Roma live below the poverty line. In 2007, 33% of social welfare beneficiaries in the country were Roma. According to the 2002 Census, only 9.2% of Roma had completed secondary school, only 37.4% had completed primary education, 28.6% had less than a primary school level, and 23.2% had no education at all. Only 0.3% had some form of post-secondary education.

The problems of Roma population in Macedonia have a long history and need concerted efforts by the central and local government, NGO sector, and the international community to be significantly improved. The percentage of Roma children enrolled in primary education varies between 90-95% depending on the source of information, but

only around 45-50% complete primary education. UNDP report¹ on Roma suggests that Roma children start school at the age of 7 at a fairly high rate (91%), but only 63% continue their schooling at the age of 10 [end of IV grade]. This report indicates enrolment rate of 19% Roma in secondary education and only 1.5 % in higher education. According to the Roma Education Fund Report², only 56% of enrolled Roma students complete the secondary education. Key education indicators on general population and on Roma can be found at:

http://www.romaeducationfund.hu/sites/default/files/publications/ref_ca_2011_mac_english_screen.pdf

Great strides have been made over the period of REP intervention, indicating increasing Roma enrolment and completion rates during declining majority population enrolment. At the primary level, approximately 90% of Roma enrolled in primary education in 2005³. According to data from the State Statistical Office, in the period 1997-2007, the number of Roma primary school graduates has been doubled from 385 in 1997/1998, 627 in 2002/2003, to 673 in 2007/08, 739 in 2009/2010 and 727 in 2010/2011. The number of Roma secondary school graduates has significantly increased from 69 in 1997/1998, 132 in 2002/2003, to 276 in 2007/08, 289 in 2009/10 and 300 in 2010/11. The number of Roma university graduates has increased from 3 in 1997 to 13 in 2007.

REP's main objectives are:

- To prepare pre-school age Roma children for entering primary school;
- To improve the school performance of Roma students aged 7-15;
- To improve the school performance of Roma students aged 15-19;
- To promote equal opportunities and increase the academic achievements of Roma students at State Universities.

REP embraces and supports the goals of the region-wide Decade for Roma Inclusion 2005 -2015, to which the Macedonian Government has already committed itself.

The ultimate aim of REP is to create critical mass of well-educated Roma that could in future stand for themselves and for the Roma community.

Pre-school and primary school components of the project (2004-2014)

These two project components are organized in 4 non-formal Roma Educational Centers (RECs) in targeted Roma communities / settlements: "Dame Gruev" in Skopje, "Lozja" and "Sredorek" in Kumanovo, and "Trizla" in Prilep.

The pre-school component focuses on increasing the knowledge and educational experiences of around 200 Roma children so they can begin primary school at less of an educational disadvantage compared with their non-Roma peers. It works on improving Macedonian language competencies, basic numeracy skills, personal hygiene and health issues.

REP's primary school component takes actions in two directions: the first one focuses on the work with/by 7 regular project primary schools, and the second one focuses on out-of-school activities for Roma students.

¹ See: UNDP; Gaber Damjanovska, N., Skenderi, S., Redzepi, N., Bojadzieva, A. and Cekregi, L. (2006), *National Vulnerability Report for Macedonia - Focus on Roma*, Skopje. Available at: <http://europeandcis.undp.org/uploads/public/file/Report2006-angl-web2.pdf>

² See: Roma Education Fund (2007), *Advancing Education of Roma in Macedonia - Country Assessment and the Roma Education Fund's Strategic Directions*, Budapest, p.7. Available at: http://www.romaeducationfund.hu/documents/Macedonia_report.pdf

³ REF Country Assessment (2007), *Advancing Education of Roma in Macedonia* available at: http://www.romaeducationfund.hu/sites/default/files/publications/macedonia_report.pdf

Project schools are provided with extensive teacher training (Step by Step methodology, Reading and Writing to Critical Thinking, Intercultural Education, Education for Social Justice, etc.). Around 380 teachers from the project schools attended at least one of the trainings.

The Roma Education Centers provide out of school support (student tutoring, assistance in homework writing, and preparation for exams, creative workshops, etc.) to 700-900 primary school students annually. Additionally, the Centers provide educative and other workshops and activities for around 300 Roma parents.

High school component (2004-2010)

Total of 1,110 scholarships were provided to a total number of 364 high school students. This component provided support to 2 cohorts of Roma secondary school students to complete their secondary education.

2004-2008: The first cohort of 262 secondary school students (54 schools countrywide) received scholarships, and mentoring support. The students participated in the project throughout their secondary education (165 from 4-years high schools and VET schools, and 70 from 3-years VET schools and 27 from special schools) regardless of their GPA- as long as they were successfully completing the school year and continued to the next one. Optional additional academic support was provided to students who applied for different activities/services based on their need and interest, such as: preparation for Matura Exam, English language and computer courses, job searching, business plan creation, debate, street law, etc.

2008-2010: The second cohort of 102 students from 40 schools (only 4-years high schools and VET schools countrywide) participated in the program for two years, starting from their 3rd year of secondary education. Selection criteria for scholarship beneficiaries was GPA of 3.00 and above (on the scale from 2 to 5). The students received scholarships and mentoring support. In addition to scholarships and mentoring support, the students were given opportunities to participate in different activities, based on their needs and interests: preparation for Matura Exam, English language and computer courses, job searching, business plan creation, debate, street law, etc.

University component (2004-2010)

There are two categories of university students that benefited from the project activities.

1. 135 scholarship recipients - received scholarships and subject-based tutoring for one or more years during their university education. Based on their needs, they participated in one or more project activities (tutoring, language and computer courses, academic workshops, etc.).
2. 130 non-scholarship recipients (according to their needs and on their request) - participated in one or more project activities (tutoring, language and computer courses, academic workshops, etc.).

Over 2,500 Roma students (from pre-school to university) benefited from REP activities. Available project data includes statistics on the number of pre-school beneficiaries and enrolment in 1st grade, statistics on the number of REP primary school beneficiaries segregated by project year, by schools and gender, as well as data on the annual completion and achievement rates (GPA and number of absences). The same statistics is available on both intervention cohorts of Roma secondary school students supported by REP, as well as on the university students that benefited from various types of interventions offered as part of project's university component.

III. PURPOSE OF THE EVALUATION

The purpose of the final performance evaluation is to examine the effects that activities of REP, funded by USAID Macedonia, had on project beneficiaries.

The three key evaluation questions are:

- (1) What differences has the project made in the lives of beneficiaries?**
- (2) Which aspects of the program had the biggest effect on beneficiaries and why?**
- (3) Which would be the key activities and interventions to continue and what role do constituents see for themselves in these efforts?**

IV. SCOPE OF WORK

This Scope of Work (SoW) for the Final Performance Evaluation of the project requires the Contractor/Evaluator to carry out and report on the following tasks:

1. What differences has the project made in the lives of beneficiaries?

- Identify and assess the difference the REP project made in the life and in the academic and/or professional careers of Roma secondary and university scholarship students/graduates supported. What is the difference compared to the situation before REP interventions? What are the effects of REP interventions in regard to attitudes of REP secondary and university graduates towards education generally, towards their education and career prospects and towards the education status of Roma community specifically? Are there any particular examples of Roma graduates that can best illustrate these effects? What are the effects of REP interventions on the overall state of secondary education and university completion and graduation rate of Roma?
- The study should consider both cognitive changes and differences, i.e., particular skills and knowledge gained by participation in the project, as well as non-cognitive skills such as determination, resilience, improved self-concept and confidence, etc.
- The primary beneficiaries of interest are university students and high school graduates, other beneficiaries include children in primary schools and pre-schools, whose parents and teachers should be included in the study.
- As for the teachers, it will be interesting to learn: 1) what they think are the effects of the program on their students; and 2) what was the influence of the project on their own experiences, in what ways has the project changed them and what they do and how they think about their future work.
- As for the parents, it will be interesting to learn: 1) how they think the project has changed their children and what differences they see; and 2) what they consider to be the effects of the project on the overall state of education of Roma in targeted Roma communities. What is the current situation compared to how things were before project interventions. What has changed?
- Identify and comment any specific gender effects in relation to above-indicated questions;

2. Which aspects of the program had the biggest effect on beneficiaries and why?

- Identify the best practices within the project, i.e., the interventions that contribute the most towards achievement of the overall project goal and objectives; what works best and why?
- Identify the lessons learned within the project. What doesn't work well and why? What could be done differently in future, why and how?
- All different elements of the program should be considered from the point of view of students, teachers and parents.

3. Which would be the key activities and interventions to continue and what role do constituents see for themselves in these efforts?

- The Ministry of Education and Science/ Department for Promotion of Education in the Languages of Ethnic Communities is also one of the constituents in the project and should be consulted under this question;

- The components of the project that the beneficiaries considered to be very effective and that should be continued, if possible, are to be discussed and developed in the report's section on recommendations;
- How well are these components still running, has the capacity of FOSM improved over the life of project, what is the capacity of FOSM and MoES to continue running these components once USAID funding is over, how well are the primary schools able to replicate some of these services;
- Specific recommendations on possible new things or other innovative interventions that might be/need to be explored in potential new Roma education projects and why.

The evaluation is expected to be participatory, involving all relevant stakeholders (Department for Promotion of Education in the Languages of Ethnic Communities at MoES, USAID and REP staff, local NGO partners, teachers, school principals).

V. EVALUATION METHODOLOGY

The Contractor/Evaluator will be responsible for defining and carrying out the overall evaluation approach. This will include specification of the techniques for evaluation findings collection and analysis, structured field visits and interactions with the beneficiaries and the implementation teams, and preparation and presentation of draft findings and recommendations.

The evaluation methodology should primarily include qualitative evaluation methods, while the already documented data on project achievements should be used as primary quantitative information source. The evaluation team, in collaboration with FOSM, will finalize the overall evaluation methodology after the first in-country travel of the evaluation team leader. However, FOSM expects the team, as a minimum requirement, to focus on the following:

- Review of project documents;
- Field visits to the Roma Education Centers (REC) and the project schools;
- Focus group discussions with parents of REP/REC pre-school and primary school beneficiaries;
- Interviews with key informants from the project schools (school principals and representatives of school psychological-pedagogical services), REC representatives (REC's managers and educators), USAID and FOSM project staff;
- Interviews with the representatives of other stakeholders (Department for Promotion of Education in the Languages of Ethnic Communities at MoES, Head of the Unit on Implementation of the Decade of Roma Inclusion at MSLP);
- Questionnaire for the teachers from REP project primary schools;
- On-line questionnaire for REP secondary school scholarship students/graduates (targeting 364 of them who live in different cities country-wide) and focus group discussions (in Skopje) with those who will respond to the invitation to participate;
- On-line questionnaire and/or focus group discussions (In Skopje) with REP university students beneficiaries; case studies/success stories with few successful REP students might illustrate the project influence at individual level;
- Interpretation of the findings;
- Other measures, as deemed necessary by the Evaluator.

The Contractor/Evaluator will be responsible for:

- (1) Reaching agreement with FOSM on the work plan/schedule of review activities;
- (2) Developing the evaluation instruments;
- (3) Day-to-day management of the evaluation work with minimum disruption to project activities;

- (4) Overall execution of the evaluation process;
- (5) Organizing de-briefing with key FOSM and USAID representatives on the final day of evaluation;
- (6) Preparation and submission of draft and final report to FOSM.

The evaluation team leader will conduct two country visits and spend **no less than twelve working days** in total in Macedonia carrying out this Statement of Work together with the evaluation team. Before arrival in country, the team leader and other member(s) shall familiarize themselves with documents about the REP project and USAID's current assistance in the Education Area. FOSM will ensure that these documents are available to the team prior to their arrival in Macedonia. The literature includes, as minimum:

- USAID Roma Education Project Description;
- REP project reports and materials: quarterly reports, annual project evaluations, project achievements data-charts, annual project portfolio review forms and miscellaneous thematic reports from other sources;
- Annual Statistical Reviews of the State Statistical Office of RM; National Strategy for Roma Inclusion; Revised National Education Action Plan for Roma Inclusion 2007-2009; National Strategy for Poverty Reduction and other national reports and documents related to education of Roma.

VI. QUALIFICATIONS

Evaluation Team Members: The team should be comprised of team leader (foreign citizen), local expert(s) and local logistics assistant (optional).

The team leader should have extensive expertise in the area of education and significant international experience (including work in Southeastern Europe) with assessments and/or evaluations of education projects.

The local expert(s) should have excellent understanding of the Macedonian education system and education of Roma and be able to establish contacts and communicate effectively with the project stakeholder's officials and school representatives.

The team should have significant experience in evaluating projects and very strong understanding of Roma education/education of vulnerable groups' issues. Knowledge of USAID and other donor assistance in the education area is desired.

All attempts should be made for the team to be comprised of an equal number of male and female members. The team leader and at least one local team member must be proficient in English. To avoid conflict of interest, none of the team members should have current or past business relationships with the project.

All team members will be required to provide a signed statement attesting an absence of conflict of interest, or describing an existing conflict of interest.

The evaluation team shall demonstrate familiarity with USAID's Evaluation Policy: (<http://transition.usaid.gov/evaluation/USAIDEvaluationPolicy.pdf>)

VII. SCHEDULE AND DELIVERABLES

The evaluation effort should take place between **April/September 2013**. The team leader should conduct **two** visits to Skopje, Macedonia.

The first three-day visit should be commenced as soon as the selection is made and contract is signed to test the draft evaluation instruments, to get better knowledge about the project and the context, as well as to finalize the entire/ detailed evaluation methodology.

The team leader should conduct the second visit as soon as the final evaluation methodology and the detailed evaluation instruments are approved by FOSM. The evaluation team should be prepared to begin work immediately. FOSM will provide the team with input and guidance in setting up a schedule of interviews and site visits, but the responsibility for the schedule resides with the Evaluator. The schedule should be defined before the team leader arrives in the country and should be finalized as soon as possible after the first visit to Macedonia.

The Contractor/Evaluator shall submit a Draft Evaluation Design document as part of technical proposal, containing: key questions, methods and data sources used to address each question and data analysis plan for each question, draft questionnaires and other data collection instruments or their main features, and known limitations to the evaluation design.

Proposed schedule:

Week of April 15th: 1) The team leader should conduct literature review; 2) Local team members should conduct literature review, schedule upcoming meetings and arrange logistics for the first visit to Macedonia; 3) Draft schedule submitted to FOSM. **(Deliverable 1)**

Week of April 22nd - 24th 1) Kick-off meeting with FOSM with the goal to establish clear expectations about the evaluation's outcomes and review of the goals, evaluation instruments and methodology, as well as the schedule for first field visits; 2) Field work in the project site in Skopje to test the methodology and pilot the evaluation instruments; 3) Brief FOSM orally on the feedback from piloting the evaluation methodology and instruments. **(Deliverable 2)**

May 6th: 1) Submission of detailed evaluation plan and methodology and evaluation instruments to FOSM; **(Deliverable 3)**

May 13th, FOSM provides comments on evaluation plan and methodology and final evaluation instruments

May 22nd: 1) Submission of final evaluation plan, methodology and instruments to FOSM; **(Deliverable 4)**

June 3rd, FOSM approves the final evaluation plan, methodology and instruments;

Week of June 17th-21st: 1) Start of field work/second visit to Macedonia; 2) By the week's end brief FOSM orally on the progress and findings to date; **(Deliverable 5)**

Week of June 24th - 27th: 1) Second week of field work; 2) By the week's end, the Contractor/Evaluator is required to brief FOSM and USAID orally on the key findings and recommendations. **(Deliverable 6)**

July 29th: 1) Contractor/Evaluator finalizes the Evaluation and submits a penultimate draft to FOSM; **(Deliverable 7)**

- a. Evaluation Report. The following sections shall be included in the document:
 - i. Table of Contents
 - ii. An Executive Summary (2,000-3,000 words) summarizing the purpose, background of the project being evaluated, main evaluation questions, methods, findings, conclusions, recommendations and lessons learned.

- iii. Evaluation Findings (between 25,000-30,000 words) which include analysis and answers to questions as listed above in Section IV Scope of Work.
- iv. Detailed Recommendations and their potential impact.
- v. Report Appendices, including:
 - Copy of the Evaluation Statement of Work;
 - Cross-reference guide enlisting the evaluation questions from Section IV and specifying on which page the questions are answered in the report.
 - Team composition and study methods;
 - List of documents consulted, and of individuals and agencies interviewed; and
 - More detailed discussions of methodological or technical issues. Limitations to the evaluation shall be disclosed in the report, with particular attention to the limitations associated with the evaluation methodology (e.g., selection bias, recall bias, unobservable differences between comparator groups, etc.).
 - Any “statements of differences” regarding significant unresolved difference of opinion by funders, implementers, and/or members of the evaluation team (final draft only).
 - All tools/instruments used in conducting the evaluation, such as questionnaires, checklists, and discussion guides.
 - Disclosure of conflicts of interest forms for all evaluation team members, either attesting to a lack of conflict of interest or describing existing conflict of interest.

August 30th: FOSM provides the Contractor/Evaluator with final comments.

Pursuant to USAID evaluation policy, draft and final evaluation reports will be evaluated against the following criteria to ensure the quality of the evaluation report.⁴

- The evaluation report should represent a thoughtful, well-researched and well organized effort to objectively evaluate the project and address the evaluation questions included in the scope of work.
- Evaluation reports shall address all evaluation questions included in the scope of work.
- The evaluation report should include the scope of work as an annex. All modifications to the scope of work, whether in technical requirements, evaluation questions, evaluation team composition, methodology or timeline need to be agreed upon in writing by FOSM. Evaluation methodology shall be explained in detail and all tools used in conducting the evaluation such as questionnaires, checklists and discussion guides will be included in an Annex in the final report.
- Evaluation findings will assess outcomes and impact on males and females.
- Limitations to the evaluation shall be disclosed in the report, with particular attention to the limitations associated with the evaluation methodology (selection bias, recall bias, unobservable differences between comparator groups, etc.).
- Evaluation findings should be presented as analyzed facts, evidence and data and not based on anecdotes, hearsay or the compilation of people’s opinions. Findings should be specific, concise and supported by strong quantitative or qualitative evidence.

⁴ <http://www.transition.usaid.gov/evaluation/USAIDEvaluationPolicy.pdf>

- Sources of information need to be properly identified and listed in an annex.
- Recommendations need to be supported by a specific set of findings.
- Recommendations should be action-oriented, practical and specific, with defined responsibility for the action.

September 20th : 1)The Contractor/Evaluator shall incorporate all comments and submit the final evaluation report to FOSM. **(Deliverable 8)**

All records from the evaluation (e.g., audio interview logs or interview transcripts, filled-in questionnaires) must be provided to FOSM. All data collected by the Contractor/Evaluator must be provided in an electronic file in easily readable format agreed upon with FOSM. The data should be organized and fully documented for use by those not fully familiar with the project or the evaluation. USAID will retain ownership of the survey and all datasets developed.

The final document must be approved in writing by FOSM.

The Contractor/Evaluator shall be responsible for providing the final deliverables to FOSM via email and in hard copy.

VIII. PROPOSED LEVEL OF EFFORT

<u>Team Leader</u>	4 days preparation 12 working days fieldwork (at least 14 days including the weekend) 10 days follow up and report preparation = 26 working days total
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<u>Local Evaluation Expert(s)</u>	2 days preparation 12 working days fieldwork 5 days follow up and report preparation = 19 working days total
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Logistics Assistant
(optional)

IX. BUDGET

The evaluation budget should not exceed the amount of 45,000 USD in total. The payment will be made to the Contractor in three installments:

- 30% after signing the Contract with FOSM,
- 40% after the approval of final evaluation plan, methodology and instruments by FOSM (prior to the second field visits),
- 30% after completion of entire evaluation work and FOSM’s approval of the final evaluation report.

X. SPECIAL PROVISIONS

Duty Post
Skopje, Macedonia.

Access to Classified Information

The Contractor/Evaluator shall not have access to any Government classified material.

Logistical Support

The Contractor/Evaluator is responsible for logistics, including office space, office supplies, equipment, computers, copiers, printers, etc. Translation services and vehicle rentals are also the responsibility of the Contractor/Evaluator.

Supervision

The Contractor/Evaluator will work under the direction of FOSM/REP Chief of Party.

Performance Period

The Evaluation will be carried out **from April to September 2013.**