

Enabling OSH education to the stakeholders using best practice and know-how of the EU OSH institutions



Project Implemented by: Macedonian occupational safety and health association – MOSHA
Supported by: Norwegian labor inspection authority



TERMS OF REFERENCE

FINAL PROJECT EXTERNAL EVALUATION

“Enabling OSH education to the stakeholders using best practice and know-how of the EU OSH institutions”

**Deadline for submission of proposals: 13th October 2016
CET.**

Project: “Enabling OSH education to the stakeholders using best practice and know-how of the EU OSH institutions”

Location: Macedonia

Donor: Kingdom of Norway

Co-funds: MOSHA

Local partner: Ministry of labor and social policy of Macedonia (MLSP), State Labor Inspectorate of Macedonia (SLI)

Project duration: 36 months

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1. INTRODUCTION

This document describes the terms of reference / technical prescriptions for an external evaluation of the “Enabling OSH education to the stakeholders using best practice and know-how of the EU OSH institutions”, implemented in Macedonia with the financial support of the Kingdom of Norway.

The project, has started in November 2013 and it will finish in October 2016.

PURPOSE AND SCOPE OF THE EVALUATION

The external evaluation will serve three main purposes:

- To provide a detailed, objective and independent assessment of the project outputs against the expected results and planned objectives. The evaluation shall focus on both quantitative and qualitative results and include, among others, an evaluation of the relevance, quality, effectiveness and efficiency of the activities carried out, the coordination of activities of MOSHA, and MOSHA’s capacity in carrying out the planned activities in Macedonia.
- An evaluation of the relations between MOSHA and the beneficiaries in terms of involvement of beneficiaries and their perceptions and views of the end results of the project activities.
- A compilation of key lessons and practical recommendations for future project planning and implementation.

2. BACKGROUND AND EVALUATION SCOPE

National education Plan for Occupational Safety and Health with created Modules based on the current situation and real needs

1. To introduce effective and functional OSH education Modules on national and company level,
2. To build the capacities of the relevant social partners to implement OSH Education Modules, and
3. To transfer the positive experience in implementation of OSH education Modules in the Region.

MOSHA is implementing 36months project.

BENEFICIARIES

The final direct beneficiaries are **320 participants from companies in Macedonia and OSH inspectors.**

Regarding the capacity building programs, 320 participants from companies and OSH inspectors will be trained through the courses provided by this project.

PROJECT RATIONALE

Overall objective: The overall objective is to stimulate introduction of OSH MS as mechanism of reducing work-related injuries and accidents by providing financial assistance to the selected companies.

Specific objective:

- To introduce effective and functional OSH Education Modules on national and company level
- Build the capacities of relevant social partners to implementation of OSH Education Modules in the Region.
- To transfer the positive experience in implementation of OSH Education Modules in the Region

Expected Results:

The incentives for businesses shall complement the other three elements of the National OSH Education Modules. It is designed to support businesses to invest into OSH standards, aimed at:

- Implementation of relevant legal provisions (EU standards)
- Reduction of social expenses,
- Trough promotion of the OSH in the company, crating CSR companies
- Culture of non-OSH compliance and its direct impact to the company, both from social and financial aspect
- Costs to National Health and Pension insurance funds) and
- Improvement of the overall performance of the labor (productivity, profits...)

The incentives scheme will be designed and should be put-into function at the beginning of second year of the project implementation. It understands the following components:

- Capacity building
- Monitoring and follow-up

3. ACTORS, MANAGEMENT AND PARTICIPATION

The evaluation will involve meeting with key project stakeholders, either in person or through phone and/or internet means. Meetings will include, but will not be limited to:

MOSHA: CEO, Project Coordinator, Corporate Outreach Coordinator

Donor: Kingdom of Norway.

External Consultants: Trainers, Awareness Raising and Media campaign consultants

Project Direct Beneficiaries: participants from companies in Macedonia and OSH inspectors.

Private Sector: companies that have employed graduates

Macedonian Government: Ministry of labor and social policy of Macedonia (MLSP), State Labor Inspectorate of Macedonia (SLI)

4. QUESTIONS AND EVALUATION CRITERIA

The evaluation will respond to a set of key evaluation questions, following the 5 development cooperation evaluation criteria: relevance, effectiveness, efficiency, impact and sustainability, as detailed below. Additionally, the evaluation shall also focus on participation and ownership evaluation criteria, as well as project consistency, target groups, gender focus, alignment with local laws and regulations, coherence and added value specific to the Kingdom of Norway.

The evaluation will respond to at least, the following questions:

In general: to what extent have the activities undertaken by this project met the overall objective and the specific objective of this grant?

1. **Relevance and coherence:** alignment of the project objectives and results to the context, beneficiaries' requirements, country needs and priorities in Macedonia. Alignment with international development cooperation standards, strategies and priorities, with a particular focus on the Kingdom of Norway policies.
 - a) In what measure do the project results address the identified problems and needs, as well as local policies action plans?
 - b) How relevant to Macedonia particular needs and constraints is the project?
 - c) To what extent are the project activities aligned with the Kingdom of Norway priorities?
 - d) Does the project meet the priorities and needs of the beneficiaries?
 - e) Have the beneficiaries' needs and constraints changed since the project inception?
 - f) Have the AECID priorities regarding development cooperation in this area changed since the project inception?
 - g) Has the project taken into account the Macedonian government development strategies and programs?

2. **Effectiveness:** level of accomplishment of the planned specific objective and expected

results, identifying the factors that affect them, including evaluating the strength and weaknesses of the measures taken –including those implemented to solve unplanned problems- to reach the expected results.

The evaluation will also include: overall quality of project design; Consistency and relevance in the identification and link between objectives and expected results; criteria used to identify the beneficiaries; identification of key stakeholders; level of accomplishment of the indicators.

- a) Have the planned results been reached in accordance to the indicators?
 - b) Is the link between activities and results strong enough to achieve the specific objective? Assessment of the impact of project activities against its objectives.
 - c) Are there any unplanned results taking place which help achieving the specific objective?
 - d) Is the participation of stakeholders and final beneficiaries significant and relevant? Does the project promote the inclusion of the most vulnerable sectors of the Macedonian society?
3. **Efficiency:** evaluation of the results obtained against the resources used, in terms of quantity, quality, budget, project timeline and deadlines. Comparison should be made against what was planned.
- a) Were the resources used to obtain the expected results sufficient and pertinent?
 - b) Are the human resources adequate?
 - c) Is the accounting and financial follow-up adequate?
 - d) Is the monitoring of the project activities, information, management and reporting adequate?
 - e) Has the project timeline and deadlines been followed as planned?
 - f) Has the transformation from resources to results been efficient? Measure the extent to which the costs of the project have been justified by the benefits obtained.
4. **Impact:** extent to which the objectives of the project have been achieved as intended, particularly the planned overall objective. Assessment of project positive and negative impact, identifying the causes that originated them. The impact of similar projects will be taken into account, as well as the visibility gained by the Norway Cooperation through this project
- a. Is there a clear pattern to achieving the overall objective?
 - b. What is the impact on the social, economic and political levels?
 - c. What is the specific impact on gender balance?
 - d. What has been the impact of visibility actions regarding the Norway's financial support?
 - e. Is there any unplanned negative impact?

5. **Sustainability:** assessment of the likelihood that the project positive outcomes and impact will continue after the project ends.
- a. Ownership of objectives and achievements by project stakeholders
 - b. Was the project budget adequate for its purpose particularly phasing out prospects?
 - c. Do the training programs provided fit in with existing needs, culture, traditions, skills or knowledge?
 - d. Have issues such as gender equity, environmental impact and social inclusion, been appropriately accounted for and managed from the outset of the project?
 - e. How long will the positive outputs last?

5. METHODOLOGY AND WORK PLAN

METHODOLOGY

The methodology to be used is to be defined by the evaluator/evaluation team, as part of their technical proposal and should be designed to effectively respond to the questions raised above.

WORK PLAN

Activities will include, but will not be limited to:

- Inception of desk phase and field phase review
- Desk phase review
- Field phase, including data collection from staff and key stakeholders and beneficiaries
- Review and discussion of initial findings with MOSHA and
- First draft report
- Final report

DOCUMENTATION

Supporting documentation available to the evaluator/evaluation team includes:

- Terms of reference of the external evaluation
- Project narrative, logical framework, activities matrix, timeline and budget
- Quarterly interim narrative and financial reports
- Final narrative and financial reports
- Norway Information on evaluation procedures

6. EVALUATION TIMETABLE

The evaluation is expected to take place within a period of three weeks (20 days). The consultant shall first expect to spend 1 day in the MOSHA's office for a briefing session with MOSHA team, particularly with MOSHA's and Chief Operating Officer, as well as MOSHA Project Coordinator. The session will include detailed planning of meetings to be held with project beneficiaries, private sector companies and key stakeholders. A visit to the training venues and the private sector companies shall be expected to evaluate the work of the trainers, as well as to interview beneficiaries. The Grants Manager will be available to accompany the Consultant when needed.

The dates mentioned in the table may be change with the agreement of all parties concerned.

| Activity | Place | Duration |
|--|-----------|----------------|
| Inception of desk phase review | - | 1 day |
| Initial gathering of information including reference group meeting | Macedonia | 2 days |
| Desk Phase | Macedonia | 2 days |
| Reference group meeting | | 1 day |
| Field Phase | Macedonia | 3 day(s) |
| Briefing MOSHA | | 0.5 day(s) |
| Debriefing MOSHA | | 0.5 day(s) |
| Synthesis Phase | Macedonia | 2 days |
| Drafting provisional final report | | 5 days |
| Reference group meeting | | 1 day(s) |
| Finalization of report | | 2 days |
| TOTAL | | 20 days |

7. STRUCTURE AND PRESENTATION OF THE REPORT

The final report should not be longer than approximately 50-70 pages. It shall be written in English and describe the evaluation, the evaluation findings, lessons learned and recommendations. Additional information on overall context, project or detailed methodology and analysis aspects shall be confined to annexes.

The main sections of the evaluation report shall include at least:

1. Executive Summary
2. Introduction (including evaluation context, methodology, constraints and limits, and evaluating team).
3. Description of the intervention evaluated
4. Analysis of the information compiled
5. Answered questions/ Findings
6. Lessons learned
7. Recommendations
8. Annexes
 - Terms of reference of the external evaluation
 - Evaluation proposal
 - Methodology
 - Detailed work plan
 - Evaluation executive summary
 - Bibliography
 - Graphic documentation (photos...)

8. AUTHORSHIP AND PUBLICATION

The final report will be the property of MOSHA and Kingdom of Norway, and shall not be circulated to other parties by the author or any other parties without prior consent by MOSHA.

9. THE EVALUATION TEAM

The external evaluator can be either an organization or an individual, and must:

- Have a solid demonstrated background in qualitative/quantitative project evaluation of more than 5 years.
- Understanding of non-formal education and professional training education.
- Understanding of OSH organizations in Macedonia.
- Familiar with participatory and partnership approaches and empowerment strategies.
- Be fluent in English and Macedonian (spoken and written).

MOSHA shall not apply any discrimination in terms of gender, religious beliefs or political views. However, women applicants are strongly encouraged.

10. EVALUATION PREMISES

The evaluator must be free of any conflict of interests regarding the writing and submission of the evaluation and must be prepared to confirm that they are evaluating independently of external influences. Additionally, the evaluator/evaluation team will adhere to the following principles at all times during the evaluation process:

- Anonymity and confidentiality of informants' opinions and assessments will be respected, including but not limited to: stakeholders, beneficiaries and private sector companies.
- Responsibility: any disagreement within the evaluation team or between them and the project coordinators, regarding the evaluation conclusions and recommendations, will be mentioned in the final report.
- Integrity
- Independence
- Information check: the evaluator/evaluation team will ensure and are responsible for the validation of the information received.
- Correct and Timely submittal of reports: if the reports (interim draft and final reports) are not submitted in due time and fashion (with an emphasis on quality and professionalism of the report), MOSHA may decide to apply penalties as outlined in the contract between the parts.

11. PRESENTATION OF THE TECHNICAL PROPOSAL

Deadline for submission of proposals and resumes: **15th September 2016**. After careful review of the proposals received, a final decision will be communicated no later than 15th October 2016.

Proposals should be sent to:

Fatmir Saracini, Project Manager, Macedonian occupational safety and health association – **MOSHA**

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