

**TERMS OF REFERENCE**

**Mid - term PROJECT EXTERNAL EVALUATION**

**“Increasing capacities and strengthening of the role of the regional CSOs for  
improvement of the labour conditions and dialogue with Public institutions”**

**Deadline for submission of proposals: 15<sup>th</sup> May 2017  
CET.**

**Project:** “Increasing capacities and strengthening of the role of the regional CSOs for improvement of the labour conditions and dialogue with Public institutions”

**Location:** 5 IPA country (Macedonia, Albania, Kosovo, Serbia and Montenegro)

**Donor:** European Commission

**Coordinator:** Macedonian Occupational Safety and Health Association

**Partners:** Albanian Occupational Safety and Health Centre, Kosovar Occupational Safety and Health Association, Serbian Association for Occupational Safety and Health and Safety at Work Association of Montenegro

**Project duration:** 42 months



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## 1. INTRODUCTION

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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 knowhow of the EU OSH institutions”, implemented in 5 IPA countries with support of the European Commission in Brussels.

The project, has started in February 2016 and it will finish in July 2019.

### 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, coordinator and partners in the action and their capacity for carrying out the planned activities in the 5 IPA countries.
- An evaluation of the relations between coordinator and partners in the action, 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

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Coordinator of the project will engage the evaluator for Mid-term and Final evaluation of project activities.

Specific objective is more dynamic civil society through networking, advocacy, long-term strategic organisational planning and fostering the level of involvement and inclusion of CSOs in decision making process related to safe and healthy labour conditions.

## Increasing capacities and strengthening the role of regional CSOs for improving labour conditions and labour dialogue with Public institutions

Results of the project are:

1. Strengthened CSOs' capacities for safety and health at work standards, labour conditions, advocacy, networking and co-operation with public authorities.
2. Increased CSOs capacities to elaborate strategic long-term organisational plan on safety and health at work, CSO advocacy and to use best practices from the EU countries to underpin their activities on regional and national level.
3. Effective and broad communication of results to the public and media regarding CSO regional collaboration, networking, safety and health at work and labour conditions.

**The Action will last 42 months (July 2019).**

### BENEFICIARIES

The final direct beneficiaries that are part of evaluation is: 75% of the final beneficiaries **from** CSOs, Public Institutions, Educational institutions, Trade Unions, Workers, Employers, Employees Organizations and Media from 5 IPA beneficiary countries.

### PROJECT RATIONALE

Project - **“Increasing capacities and strengthening of the role of the regional CSOs for improvement of the labor conditions and dialogue with Public Institutions”**, supported by the European Commission in Brussels. Project will be commenced in 5 IPA countries through the involvement of project partners:

- Macedonian Occupational Safety and Health Association (MOSHA),
- Serbian Association for Occupational Safety and Health (SAOHS)
- Albanian Occupational Safety and Health Centre (AOSHC)
- Kosovar Occupational Safety and Health Association (KOSHA) and
- Safety at Work Association of Montenegro (SWAM).

**Overall project objective** is enabling environment for dialogue between regional CSOs and public institutions for improving labor conditions.

**Target groups** are CSOs from 5 IPA beneficiary countries, Public Institutions, Trade Unions, Employers' Organizations and Media.

**The final beneficiaries** are Workers, Employers, Employees, CSOs from 5 IPA beneficiary countries, Public Institutions, Media.



**Increasing capacities and strengthening the role of regional CSOs for improving labour conditions and labour dialogue with Public institutions**

**Specific project objective** is more dynamic civil society through networking, advocacy, long-term strategic organizational planning and fostering the level of involvement and inclusion of CSOs in decision making process related to safe and healthy labor conditions.

More specifically actions that involve:

- baseline-studies,
- training actions,
- study visits,
- field trips,
- facilitation of contacts,
- consultations and discussions between different stakeholders,
- communication and information activities aimed at supporting consultation with stakeholders,
- organization of conferences,
- roundtables,
- workshops,
- seminars (a very limited number per proposed action),
- advocacy for the revision of existing legislation and adoption of new legislation in accordance with EU standards and requirements,
- drafting policy or legislation recommendations,
- public awareness raising campaigns,
- publication of leaflets, and
- manuals on best practice.

The Project has the following outputs:

- 1 Project Communication Strategy;
- 1 Kick off meeting of the BALcanOSH network about the project activities and forming of Steering Committee;
- 5 Regional initial meetings with members of CSOs and public institution in each IPA beneficiary country;
- 15 Cross-sector meetings with CSOs, Public Institution and Media Organizations;
- 5 Regional trainings on basic safety and health at work, standards, labor conditions, advocacy & lobbying skill;
- 5 Baseline-studies on the labour conditions for safety and health at work, implementation of EU directive (EU OSH 89/391) and involvement of CSOs in decision-making processes;
- 1 Study visit to EU country;
- 5 press-conferences regarding dissemination of knowledge during the Study visit;
- 5 Baseline-studies will be published in 250 copies in 5 languages;
- 1 joint regional study will be published in 500 copies;
- 1 Joint Regional Strategy will be published in form of brochure in 1,000 copies;
- 5 Round tables organized in Macedonia, Albania, Kosovo, Montenegro and Serbia;

## Increasing capacities and strengthening the role of regional CSOs for improving labour conditions and labour dialogue with Public institutions

- 1 International conference on CSOs regional collaboration, networking, regional strategy on occupational safety and health and CSOs involvement together with representatives from EU countries and Public Institutions from EU;
- 1 Interactive regional web site as a tool and guideline for CSOs from the IPA region on networking, advocacy, labour conditions and OSH;
- 3 project's social media profiles on Facebook, Twitter and LinkedIn;
- 10,000 leaflets;
- 1 TV clip;
- 150 ad campaigns on Facebook, Twitter and LinkedIn;
- 1 YouTube channel;
- 5 informative sessions;

The final expected **results** by implementation of the project are:

1. Strengthened CSOs' capacities for safety and health at work standards, labor conditions, advocacy, networking and co-operation with public authorities.
2. Increased CSOs capacities to elaborate strategic long-term organizational plan on safety and health at work, CSO advocacy and to use best practices from the EU countries to underpin their activities on regional and national level.
3. Effective and broad communication of results to the public and media regarding CSO regional collaboration, networking, safety and health at work and labor conditions.

### 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:

#### All project partners:

- **MOSHA:** Project Manager, Project Officer, Administration Officer
- **SAOHS:** Project Officer
- **AOSHC:** Project Officer
- **KOSHA:** Project Officer
- **SWAM:** Project Officer

**Joint Steering Committee:** 7 representatives of the IPA region

**Donor:** European Commission.

**External Consultants:** Consultancy on Strategic and Project Planning, Media Consultancy, Domestic and regional Trainers, EU and regional expert/consultant



**Increasing capacities and strengthening the role of regional CSOs for  
improving labour conditions and labour dialogue with Public institutions**

**Project Direct Beneficiaries:** participants from CSOs, Public Institutions, Trade Unions, Workers, Employers, Employees, educational institutions, Organizations and Media from 5 IPA beneficiary countries

**Governments of 5 IPA Countries:** 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 European Commission.

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 5IPA countries. Alignment with international development cooperation standards, strategies and priorities, with a particular focus on the European Commission 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 are the particular needs and constraints is the project to all 5 IPA countries?
  - c) To what extent are the project activities aligned with the European Commission 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 priorities regarding development cooperation in this area changed since the project inception?
  - g) Has the project taken into account the all partners countries government development strategies and programs in the project?
  
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.

**Increasing capacities and strengthening the role of regional CSOs for  
improving labour conditions and labour dialogue with Public institutions**

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 all 5 IPA countries.?
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 European Commission 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 European Commission'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.
- Ownership of objectives and achievements by project stakeholders
  - Was the project budget adequate for its purpose particularly phasing out prospects?
  - Do the training programs provided fit in with existing needs, culture, traditions, skills or knowledge?
  - Have issues such as gender equity, environmental impact and social inclusion, appropriately accounted for and managed from the outset of the project?
  - 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 Lead partner 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
- European Information on evaluation procedures

## *6. EVALUATION TIMETABLE*

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The evaluation is expected to take place within a period of implementation of the project activities. The evaluation activities consultant shall implement in period for Mid-term evaluation and final evaluation.

Mid-term evaluation should be implemented within 18 months of the project start.

Final evaluation will be implemented at the end of project.

## *7. STRUCTURE AND PRESENTATION OF THE REPORT*

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The mid-term report should not be longer than approximately 25-35 pages and 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

## 8. AUTHORSHIP AND PUBLICATION

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

## 9. THE EVALUATION TEAM

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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 networking in the region
- Understanding of OSH organizations in the region of Balkan.
- Familiar with participatory and partnership approaches and empowerment strategies.
- Be fluent in English (spoken and written).
- Terms of reference of the external evaluation
- Evaluation proposal
- Methodology
- Detailed work plan
- Evaluation executive summary
- Bibliography
- Graphic documentation (photos...)
- Budget

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

## 10. EVALUATION PREMISES

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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

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Deadline for submission of proposals and resumes: **15<sup>th</sup> May 2017**. After careful review of the proposals received, a final decision will be communicated no later than **31<sup>th</sup> May 2017**.

Proposals should be sent to:

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