

TERMS OF REFERENCE

EVALUATION OF THE CARITAS DEVELOPMENT INSTITUTE (CDI) (PROJECT PHASE–XI)

Introduction

Caritas Development Institute (CDI), the training and research centre of Caritas Bangladesh started its journey in 1983. Since its inception CDI has been playing a vital role in formation and capacity development of Caritas staff, other NGO staff, People’s organization, Church and ethnic institutions. It has been registered as a trust of Caritas Bangladesh from the 11th January 2010. Since then CDI has been being governed under the guidance of a five-member Board of Trustees (BOT). Being a trust of Caritas, CDI got autonomous authority to grow up as an independent national institute for value education, formation and capacity development. Among the four priority areas of Caritas, CDI falls under the priority area; Human Resource Development through Education, Formation and Capacity Building. Being a training and research centre of Caritas Bangladesh, CDI has been significantly contributing towards promotion and sustain of Caritas philosophy, values and principles among its development partners.

CDI especially emphasizes on strengthening the capacity of its development partners and institutes through training, research, relevant and required information collection, documentation and dissemination. CDI facilitates and inspires development partners to be respectful and responsive to the needs of the people for whom they are working for. It also contributes to make them innovative and creative in undertaking development interventions guided by humanistic values. Its major concern is the sustainability of people and social institutions. CDI is also committed to extend needs based services for its development partners without any discrimination. It focuses on value education for promoting and sustaining moral values among its development partners. CDI strongly believes in the latent potential of people who can become the master of their destiny and strives to make them critically conscious about their potentialities through an institutional and human resource development approach.

Since inception (1983) Misereor has been supporting the activities of CDI. The CDI carried out both internal and external evaluations to assess its previous planned activities whether they are in line with achieving the project goal or not. In 2011 CDI carried out an Internal Review of the continuation project phase VII. Based on the recommendations of the Internal Review, CDI designed the project proposal phase VIII that started from January 2012. The last external evaluations carried out in 2014 during the phase VIII. CDI has formulated its five years (2012-2016) Participatory Strategic Plan (PSP) and subsequently revised for 2016-2021. In PSP CDI has identified strategic directions towards rendering quality services and its sustainability.

The present ToR is prepared for the external evaluation of the continuation Project Phase XI for the period from October 2021 – September 2024.

Objective of the Evaluation

The objective of the evaluation is to find out the quality and marketability of the trainings and research/studies of CDI, and suggest potentially useful adjustments to even stronger support CDI partners.

Key Issues to be considered in the Evaluation

Relevance

1. To what extent is CDI intervention important for the target group (e.g. does it focus on important bottlenecks of development partners)? Are topics like ‘people-led development processes’ taken into account?
2. Is CDI an interesting partner for organizations outside the Catholic Church?
3. Is CDI sufficiently flexible to react adequately to a changing context?
4. Is the present focus in the cooperation between CDI and MISEREOR the most appropriate or are relevant topics left aside?

Outcomes and impacts

1. What specific changes / real differences have the projects made to CDI development partners in institution building, program management, and human resource development through capacity development during the project period?
2. What are the concrete changes made in the field of training in terms of implementation and dissemination of training learning by the post trainee, satisfaction level of training participants, training needs assessment (TNA) process, facilitation style, follow up of post training learning by trainers, spiritual and moral impact on development partners and institution building and program management? Quantify as far as possible and differentiate the beneficiaries as far as possible (e.g., between men and women).
3. What are the outcomes and impacts of CDI research?
4. What are the outcomes and impacts of CDI library as a resource centre for required relevant and updated information by its development partners?

Effectiveness

1. In how far both outcomes and outputs of the project have been achieved during the project period (or in the case of the actual project, are likely to be achieved)?
2. What were the barriers in achieving the project objectives?

Organizational aspects

1. In how far the recommendations of the last external evaluation (phase IX) have been implemented?
2. What were the constraints in achieving those recommendations?
3. In how far is CDI Staff competent enough for responding to the needs of the development partners and rendering quality services? The question refers to methodological and topic-wise knowledge. Are resource persons within own staff sufficiently used?
4. What initiatives have been taken for staff development? Did it bring any changes in staff performance? What were the limitations? Were they sufficiently praxis oriented?
5. Is Personnel Management appropriate to render quality services?
6. In how far is the existing monitoring system of CDI appropriate for rendering and constantly improving quality services? In how far has CDI upgraded its existing monitoring tools and what steps have been taken for ensuring its application for effective and efficient utilization of its resources?
7. What are the strengths and weaknesses of the training and research wings of CDI towards rendering services considering demand in line with the present context of partners' needs?
8. Are the research need identification process, internal and external use of research findings and its follow– up processes adequate?

9. Are networking with other research organizations and joint ventures contributing to the intended and the realized outcomes and impacts in an optimal way?

Efficiency

1. Were the outcomes and impacts achieved at reasonable costs?

Sustainability

1. In how far are the above mentioned outcomes and impacts sustainable, i.e. persistent for a long time after support by CDI? Are ways necessary and offered to sustain initial changes (refresher contacts, follow-up initiatives, networking between beneficiaries, ...)?
2. To what extent are CDI sustainability plan and CDI marketing plan functional and appropriate?
3. Review in this context existing opportunities to increase local income towards financial sustainability, e.g. through networking with other NGOs/GOs.

Methodology

1. It will be a participatory evaluation, concerning CDI development partners / beneficiaries and CDI staff. The Evaluation Team will collect information from various levels of development partners.
2. The evaluators and the project holder will jointly agree on the evaluation methodology. The evaluators will present a draft detailed plan of the evaluation process. The methodologies may include the following steps (to be finally decided upon by the evaluators):
 - Study of documents; especially the project proposal, annual and progress reports, training modules, materials and reports, research/study documents, CDI publications, etc.
 - Conduct a one-day introductory workshop with all /selected staff of CDI.
 - Visit regional/project/Trust/NGO offices, Church institutes, conduct workshops at different level, FGD with the beneficiary, interview with selected development partners of the project and staff at different level and participant observation.
 - Meeting with the Members of the Board of Trustees (BOT) of CDI, Caritas Directors, selected
 - Church personnel.
 - De-briefing workshop: One day de-briefing workshop will be organized for presentation and discussion of the findings of the evaluation team with CDI staff and selected representatives.
 - After incorporating the feedback on the recommendations, the final report will be submitted at the end of the evaluation.

Expected Deliverables

1. **Inception report:** Based on inception meeting, ToR, and submitted proposal
2. **Interim Report:** Preliminary findings and progress on data collection and analysis.
3. **Draft Final Report:** Comprehensive evaluation report including all tasks mentioned in the ToR.
4. **Final Report:** Incorporating feedback from stakeholders, a finalized comprehensive report with strategic recommendations Institutional development and program development.

Evaluation Team: The Evaluation Team will be comprised of 02 members [One from Bangladesh and one from abroad]. The Team Leader will have overall responsibility for carrying out the evaluation.

Timeframe/ Schedule

The evaluation will take place from the February – March 2025 as per the following schedule:

Activities/particulars	Days
Preparation: Document review, prior consultations, arrangements	3
Meeting of evaluation team, meeting of evaluators with CDI management	1
Start-up workshop with CDI staff	1
Discussions with CDI staff and external trainers contracted by CDI (in case there are)	3
Field visits	8
Meeting with BOT Members, Directors of Caritas, Church personnel, and other informants	3
Preparation of debriefing workshop by the evaluators, drafting recommendations and structure of the report	2
Report writing	4

Report

The report should comprise approx. 30 to 40 pages (excluding annexes). The Team Leader will have overall responsibility for the report.

The report should include the following (this is not a normative format, i.e. the structure and sequence of items can be changed):

1. Executive summary of approx. 2 pages:
 - a. short description of the project implementing organization and the project itself;
 - b. objectives of the assignment and procedure(s) chosen;
 - c. essential results/findings relating to the core questions of the Terms of Reference, including an overall assessment of the work appraised;
 - d. the most important recommendations.
2. A brief description of the assignment and the approach and methodology used.
3. A central part structured in a number of chapters dealing with the questions and issues which were the subject of the assignment.
 - a. Particular emphasis should be placed on presenting in detail the effects / outcome and impacts identified.
4. Conclusions, including an overall assessment of the work appraised and presenting the ‘lessons learnt’.
5. Recommendations, prioritized and addressed to specific actors (Who should do what?).

The report should also have:

- a cover page (presenting the number of the evaluated project and of the evaluation contract);
- a table of contents;
- a list of acronyms/abbreviations;
- enclosures including:
 - Terms of Reference;

- chronology of the assignment;
- list of people met and talked with;
- (if applicable:) list of documents referred to (or otherwise relevant);
- (if it makes sense:) detailed evidence supporting the argumentation presented in the main part (tables, charts, texts, tools used such as questionnaires, etc.);

Qualifications:

The consultant / firm must have the following qualifications:

- A minimum of 10 years of relevant experience in institutional sustainability and capacity development, specifically in project evaluation, institutional strategy and policy development, market assessments, and project management.
- Proven track record of conducting comprehensive assessments or evaluations of human resource development projects,
- Experience working in Bangladesh or similar contexts is highly desirable.
- In-depth knowledge of strategic planning and policymaking, institutional development and sustainability, training and research development and project evaluation by using DAC criteria,

Evaluation Service Cost

The budget should include VAT and Tax.

International consultant should include all travel cost and visa processing cost

Contract Information:

Any inquiries regarding this consultancy (external evaluation) should be directed to:

Email: cdi@caritascdi.org

Interested Consultant(S)/Consultancy Agencies should include the name and detailed contact address of the consultant/team. Detailed CVs of the team members should be included in the annexure of the technical proposal.

Evaluation Criteria:

Proposals will be evaluated based on the following criteria:

Technical Proposal with Methodology, Relevant Experience and Qualifications: 70%

Financial Proposal: 30%

Submission of the Proposal

The deadline for submission of proposal is **November 14, 2024**.

Email: cdi@caritascdi.org

Disclaimer: CDI reserves the right to accept or reject any or all applications without assigning any reason thereof