



ORGANISATION OF EASTERN CARIBBEAN STATES

INVITATION FOR EXPRESSIONS OF INTEREST

CONSULTANCY SERVICES

FOR

***MID-TERM EVALUATION FOR THE OECS PROGRAMME FOR EDUCATIONAL
ADVANCEMENT AND RELEVANT LEARNING (OECS PEARL)***

The Organisation of Eastern Caribbean States (OECS) Commission invites interested eligible consultants to submit Expressions of Interest for the provision of consultancy services to undertake a **Mid-Term Evaluation for the OECS Programme for Educational Advancement and Relevant Learning (OECS PEARL)**.

The Terms of Reference and Guidelines for the Submission of Expressions of Interest for this consultancy are provided below.

Terms of Reference

Mid-Term Evaluation for the OECS Programme for Educational Advancement and Relevant Learning (OECS PEARL)

The Terms of Reference and Guidelines for the Submission of Expressions of Interest for this consultancy are provided below and should be read together with the Programme Description which can be accessed here. ([The OECS PEARL](#))

1.0 Introduction and Rationale for Mid-Term Evaluation

The Organisation of Eastern Caribbean States (OECS) Commission has received funding from the Global Partnership for Education (GPE) towards support for the implementation of the OECS Education Sector Strategy (OESS). The OECS Programme for Educational Advancement and Relevant Learning (PEARL) is a four-year project valued at USD10 million. This funding is to assist the OECS Member States to achieve the goal of the OESS: **Improved and more equitable learning outcomes through the provision of quality and relevant education and training in the OECS**. In relation to this goal, the funding will focus on expanded access and improved student learning in basic education. The programme will be implemented at the primary level (Grade K to Grade 6) in the nine (9) English-speaking OECS Member States with an emphasis on the four (4) Windward Islands that belong to the GPE group of developing country partners. While the programme will directly benefit the four (4) GPE Member States¹, the Non-GPE² Member States will also benefit by participating in selected areas of the programme. Appendix A presents a matrix highlighting the specific programme areas intended for GPE Member States only and those for non-GPE Member States. The OECS PEARL will be implemented by the Education Development Management Unit (EDMU) of the OECS Commission along with Ministries of Education (MoEs) of the nine (9) English-speaking Member States. The programme's implementation commenced July 1, 2021 with four (4) main components:

- Component 1 - Enhanced quality and equity of access to ECD and Special Education Needs (SEN) Services
- Component 2 - Enhanced Curriculum and Assessment
- Component 3 - Strengthened Leadership and Management
- Component 4 - Program Management, Institutional Strengthening, Monitoring and Evaluation

The main objective of the PEARL is to provide improved and more equitable learning outcomes through the provision of quality and relevant education and training in the OECS. The PEARL is being implemented at both Regional and National levels; as such, the Mid-Term Evaluation should consider approaches for reviewing progress towards targets at both levels. All components of the PEARL are being implemented in the 4 GPE Member States, namely, the Commonwealth of

¹ The four GPE Member States are: Dominica, Grenada, Saint Lucia and St Vincent and the Grenadines.

² The Non-GPE Member States are: Anguilla, Antigua and Barbuda, British Virgin Islands, Montserrat and St Kitts and Nevis.

Dominica, Grenada, Saint Lucia and Saint Vincent and the Grenadines; while some activities such as the OECS Harmonized Primary Curriculum, the Special Education Needs (SEN) Survey, the Professional Development Program and the Monitoring, Evaluation, Reporting and Learning (MERL) Platform are being implemented in all nine (9) Member States.

Consistent with the Programme Description, two evaluations are required during implementation: one at the mid-term and the other at the end of the project. Currently, the PEARL is closely approaching the end of its second year of implementation. As such, a mid-term evaluation (MTE) will be conducted.

2.0 Purpose, Scope and Clients of the Evaluation

2.1 Purpose

The purpose of this mid-term evaluation is to review the project progress, achievements and challenges, inform of key lessons learned, and propose recommendations for any improvement or adjustments in scope, budget and schedule for the remaining project implementation period with a view to increasing the likelihood of achieving intended impact. Specifically, the mid-term evaluation will focus on the following aspects:

- I. **Assessment of the programmers' progress** through the established indicators, provide evidence of results to date and of the likelihood of achieving outcomes and impact as stipulated in the Programme Document, while meeting accountability requirements.
- II. **Assessment of the project design and activities**, implementation strategy and approaches, capacities of implementing partners, challenges and how these challenges are addressed; and to what extent these contribute to the achievement of project objectives.
- III. **Drawing key findings and lessons learnt and proposing improvement and adjustment needed** to ensure that the project remains relevant to the needs of the target groups.
- IV. **Promote learning, feedback and knowledge sharing** among the implementing and co-implementing partners as well as select stakeholders.
- V. **Provide a basis for potential restructuring** of the Programme and its implementation.

2.2 Scope

The mid-term evaluation shall be undertaken for the period of July 2021 to June 2023, to create an accurate and comprehensive picture of the project implementation, generating findings on evaluation criteria and documenting good practices and lessons learnt. This should include an evaluation of all nine (9) Member States as stated under Section 1.0 - Introduction. The evaluation shall integrate gender equality as a cross-cutting concern throughout its methodology and all deliverables including the final report in accordance with the [Gender Equality Mainstreaming Policy for the Organisation of Eastern Caribbean States \(OECS\) Commission](#).

The scope of the evaluation shall focus on developing the deliverables outlined in Section 4.0 of this Terms of Reference. The evaluation shall examine project implementation against the criteria proposed below by addressing the following questions. Notwithstanding, the Consultant shall

develop a more detailed analytic framework of questions and sub-questions to carry out the evaluation.

RELEVANCE and strategic fit of the project

To what extent are the project objectives/outcomes relevant to the needs of the beneficiaries? Specifically:

Direct recipients:

- *Educators and students in OECS Member States*

Were project methodologies and approaches in line with the project partners' priorities, capacities and expectations?

To what extent have the project's interventions so far contributed to improved and more equitable learning outcomes through the provision of quality and relevant education and training in the OECS?

Should the project design and methodology be modified to improve its relevance in the second half of the project? If so, how?

To what extent was the project affected by the COVID-19 pandemic and what adjustments has the project made?

COHERENCE

The extent to which the project has worked in collaboration with the Ministries of Education national priorities.

The extent that the project has added value and collaborated with other similar initiatives at the national level.

The extent the project has yielded the expected results.

Project PROGRESS and EFFECTIVENESS

To what extent has the project been making progress towards its planned objectives?

- *What have been achieved so far?*
- *What are the major constraints so far?*

**EFFICIENCY of
resource use**

To what extent has the project secured the commitment of the project partners and built up national ownership?

How do the national project partners explain the delay in delivery?

Have the project approaches appropriately matched the capacity (including political space) of the project partners for their action?

What measures are required to improve the capacity of project partners in the second half of the project?

To what extent has the project promoted gender equality?

What approaches have been adopted to ensure the interests of beneficiaries including women and other socially and economically disadvantaged groups are fully taken into account in developing project outputs and carrying out project activities?

Have resources (funds, human resources, time, expertise etc.) been allocated strategically to achieve outcomes?

**SUSTAINABILITY
and IMPACT of the
project**

How effectively has the project built the necessary capacity of people and institutions (of national partners and implementing partners)? How effectively has the project built national ownership and capacity?

How likely is the project to achieve its objectives in the second half of the period of implementation and what elements need to be taken into account to ensure outcomes?

2.3 Clients

The clients and users of this mid-term evaluation include the OECS Commission, Ministries of Education in the nine (9) English-speaking Member States, the Regional Education Group (REG) and the Global Partnership for Education.

3.0 Methodology

The mid-term evaluation shall be carried out in accordance with the OECS Commission's standard policies and procedures, comply with evaluation norms and follow ethical safeguards. The evaluation shall be carried out in a participatory manner to ensure the involvement of key stakeholders in particular national project partners and the donor, in all phases of the evaluation, including preparation, interviews, report preparation and dissemination.

The evaluation shall be carried out from August 2023 - October 2023, with a final report being available by 31 October 2023. The following methods shall be used as a minimum to collect information:

- Desk review: Review and analysis of documents related to the project, including Project Documents, 1st and 2nd Annual Progress Report submitted to the donor by the OECS Commission and other Consultants' Reports including submissions from the Project Implementing Consultancy Team (PICT) and the Monitoring and Evaluation Consultants.
- Project documentation: Project Steering Committee (PSC) meeting reports.
- Review of other relevant documents which will be made available by the EDMU, including, among others:
 1. [Approved ESPIG Document](#)
 2. [Mid-Term Review of the OESS \(2019\)](#)
 3. [OECS Data Quality Assessment Report \(2019\)](#)
 4. [OECS Data Governance and Management Framework](#)
 5. [Draft OECS Education Initiatives Sustainability Framework](#)
 6. Restructuring Proposal
 7. Reprioritization Exercise Document
 8. OECS Strategic Plan
 9. [OECS Growth and Development Strategy](#)
 10. OECS Stakeholder Databases

The desk review will provide a number of initial findings that in turn may point to additional or fine-tuned evaluation questions. Documents 6, 7, 8 and 10 will be shared upon successful recruitment of the consultant due to the nature of the information contained therein.

Interviews

The Consultant is required to conduct interviews virtually to achieve efficiencies of cost and time. All nine (9) OECS countries should be included in the interviews, although the nature of the interview will vary for the five (5) non-GPE countries due to the reduced scope of implementation in these territories.

- A list of contacts for the interviews will be provided by the OECS Commission at the beginning of the evaluation.
- The Consultant shall undertake group/individual discussions with the key project stakeholders, in keeping with the Consultant's methodology that is approved by the OECS Commission.

- The Consultant shall conduct interviews with project partners based on semi-structured questionnaires.

Document Development Process

In instances where a document is deemed a deliverable (as identified in Table 1) or an output as outlined in the Programme Document, the following process should be observed:

- Feedback on an initial draft will be provided by the OECS Commission and in some cases by the participating OECS Member States.
- Where feedback is provided, the Consultant is required to prepare a response document detailing the responses to and actions taken based on the feedback.
- Two versions of the document should be resubmitted, one with tracked changes to reflect the amendments made based on the feedback provided and a clean, fully edited version for approval.

The Consultant shall be responsible for ensuring that all final deliverables are proofread and error-free. This requirement shall be considered in making final decisions regarding acceptance of and payment for final deliverables.

4.0 Key Outputs and Deliverables

The key activities of the assignment, the expected outputs and estimated time inputs are detailed in Table 1 below:

Table 1: Key outputs and deliverables

Deliverable	Activities	Estimated Time Input (Working days)
<p>Deliverable#1: An Inception Report detailing the Consultant's approach to the Assignment</p>	<ul style="list-style-type: none"> • Prepare a work plan for the full duration of the consultancy including the Consultant's methodology; • Undertake a detailed desk review of relevant documents which will be made available by the EDMU, including, among others: <ul style="list-style-type: none"> ○ Mid-Term Review of the OESS (2019) OECS Data Quality Assessment Report (2019) ○ OECS Data Governance and Management Framework ○ Draft OECS Education Initiatives Sustainability Framework • Refined evaluation approach and/or questions Upon review of the available documents and an initial discussion, through virtual interviews, with relevant OECS Commission personnel, the Consultant shall develop a detailed analytic framework of questions and sub-questions, 	<p>8 Working Days</p>

	based on the evaluation questions defined in this ToR, and consistent with Results-Based Management (RBM) and the OECD/DAC criteria.	
Deliverable #2: Draft Evaluation Report	<p>Evaluation report as per the proposed structure:</p> <ul style="list-style-type: none"> ● Title page ● Table of contents ● Executive summary ● Project background ● Evaluation background ● Methodology ● Limitations ● Findings ● Gender issues assessment ● Emerging risks and mitigations ● Lessons learned and emerging good practices ● Recommendations for potential restructuring and Justifications ● Appendices ● A concise PowerPoint presentation with the preliminary findings and recommendations to be presented to the OECS Commission, Member States and Partners. 	22 Working Days
Deliverable #3: Final Evaluation Report	<ul style="list-style-type: none"> ● The main evaluation report should be concise (supporting data and details can be included in annexes) and should address comments made by the OECS Commission during the presentation of the preliminary findings. 	5 Working Days

5.0 Institutional Arrangements and Reporting

The Mid-Term Evaluation Consultant shall report to the Programme Director, EDMU, with technical inputs from the PEARL Project Management Team of the EDMU. In the execution of duties, the Consultant will be expected to liaise and collaborate with teams within the OECS Commission, participating OECS Member States, other duly appointed OECS PEARL consultants, and relevant government institutions and authorities.

All Reports listed in Table 1 shall be prepared and submitted in Microsoft Word format or other agreed format via electronic mail or web platform to oeccspearl@oeccs.int. The final report of the consultancy shall be submitted in electronic copy (PDF & MS Word format). Note that National Coordinators have been appointed in each GPE Member State to assist with coordinating arrangements for field work and logistical planning. However, the Consultant shall be responsible for making logistical arrangements for the country visits.

Ownership of the data from the evaluation rests with the OECS Commission. The copyright of the evaluation report will rest exclusively with the OECS Commission. Use of the data for publication or other presentations can only be made with the written agreement of the OECS Commission.

6.0 Indicative Payment Schedule

Deliverable	Payment
Output 1: Inception Report	10%
Output 2: Draft Evaluation Report	60%
Output 3: Final Evaluation Report	30%
TOTAL	100%

7.0 Duration/Schedule for Completion of Contract Deliverables

The Assignment is expected to be undertaken in thirty-five (35) professional days over a period of 3 months (August 2023 - October 2023). The Consultant should indicate in their proposal how (virtual/in-person) the consultancy will be undertaken.

TASKS	ITEM	SCHEDULE DELIVERY DATES
1.	Inception Report	Five (5) working days after Contract signing
2.	Draft Evaluation Report (including presentation of preliminary findings)	Fifteen (15) working days after approval of Inception Report
3.	Final Evaluation Report	Five (5) working days after receiving feedback on the Draft Evaluation Report

8.0 Qualifications and Experience

An individual consultant with the following expertise and qualification:

Qualification and skills:

- At minimum, a Masters' degree in Monitoring & Evaluations, Social Sciences, Development studies, Demography, Economics or related qualification;
- Excellent communication (written and verbal) and interview skills in English;
- Excellent report writing and presentation skills.

Professional experience:

- A minimum of 10 years' professional experience, specifically in evaluating development initiatives;
- Demonstrated expertise and capability in assessing education systems to include but not limited to Early Childhood Education, Curriculum and Assessment Strategies, Leadership and Management for school leaders;
- At least 10 years of proven experience with logical framework approaches and other strategic planning approaches, M&E methods and approaches, information analysis and report writing;
- Proven knowledge of the OECS education sector and experience in the evaluation of similar programmes;
- Demonstration of a understanding of the development context of the project beneficiary countries would be a clear advantage;
- Proof of an evaluation of a project done within the last five years with evidence that the consultant worked individually or led the assignment.

GUIDELINES FOR SUBMISSION OF EXPRESSIONS OF INTEREST

Eligible Individual Consultants are invited to indicate their interest in providing the services. Interested Consultants must provide information on their capability and suitability to undertake the assignment.

Individual Consultants interested in undertaking the prescribed Services are to email an Expression of Interest to include:

1. Information on the Consultant's qualifications to perform the services, experience and competence relevant to the assignment, including a Curriculum Vitae.
2. A concept note on the planned framework for undertaking the assignment and a breakdown of the number of days required for each task (*as per Table 1*).

Expressions of Interests submitted should not exceed 30 pages.

The Consultant shall bear all costs associated with the preparation and submission of his/her Expression of Interest.

The OECS is not bound to accept any Expression of Interest, and reserves the right to annul the selection process at any time prior to contract award, without thereby incurring any liability to the Consultants.

For more information or to submit Expressions of Interest, please contact:

Procurement Officer
OECS Commission Morne Fortuné
P.O. Box 1383
Castries
Saint Lucia
Telephone:
Email: procurementbids@oecs.int

Copied to:
oeccpearl@oecs.int

An Individual Consultant will be selected in accordance with the Consultant's Qualifications (CQS) Selection Method as detailed in the procedures set out in the Procurement Manual of the OECS, dated November 2013 revised February 2022.

The criteria to evaluate the Expressions of Interest received in relation to this assignment may include:

- Technical competence in undertaking the assignment;
- Academic qualifications;
- Experience in undertaking similar assignments; and

- Planned framework submitted for undertaking the assignment to include methodology, detailed work schedule and implementation plans.

The Expressions of Interest will be evaluated and the Individual Consultant with the most relevant experience, qualifications and technical competence will be selected and requested to submit a financial proposal, which will be the basis for negotiations leading to a contract.

It is expected that the services will be conducted from August 2023, in keeping with the terms outlined in the Reporting Requirements above.

An electronic copy of the Expressions of Interest should be submitted by **July 12th 2023**, addressed to:

Procurement Officer
OECS Commission Morne Fortuné
P.O. Box 1383
Castries
Saint Lucia
Email: procurementbids@oecs.int

The email submissions should include the name and address of the Individual Consultant and shall be clearly marked in the subject line as “Expression of Interest – ***Mid-Term Evaluation for the OECS Programme for Educational Advancement and Relevant Learning (OECS PEARL)***”