



# Eurocarers external evaluation

## Terms of reference

11 July 2016

### I. Background

Eurocarers currently receives financial support from the European Commission through its Programme for Employment and Social Innovation (EaSI). This funding is part of a 4-years framework partnership agreement (2014-2017) which greatly contributes to positioning Eurocarers as a strong knowledge-broker on the issues of care, carers and caring in Europe. Eurocarers is now seeking an external expert to conduct an independent monitoring and evaluation exercise, leading to both a qualitative and quantitative assessment of progress made through our EaSI-funded activities since 2014.

These terms of reference set out the framework for this independent evaluation.

**Consultants are invited to respond to the ToR with a CV and budget by the 15<sup>th</sup> September 2016.**

### II. Objectives

The purpose of this external evaluation is to provide an evaluation of Eurocarers' work in relation to this contract, and more generally to support the strengthening of Eurocarers' strategic planning, operational effectiveness and internal governance.

**The specific aim is to help Eurocarers strengthen its capacity and draw upon best practice to improve its functioning. The evaluation should therefore include an analysis of the progress made by Eurocarers in achieving its objectives. A participatory evaluation process will be conducted by the independent evaluator.**

The evaluation will be conducted according to specific objectives set up by the European Commission:

- a. Support the development, implementation, monitoring and evaluation of initiatives undertaken to support the policy objectives of the Europe 2020 Strategy and the Social Investment package through the main EU driven processes such as the open method of coordination on social protection and social inclusion and the European Semester,
- b. Support stakeholders' involvement in the policy process,
- c. Strengthen the capacity of EU-level NGOs networks and their national members, including their knowledge of relevant EU matters,
- d. Provide data and strong evidence base on policy developments and trends as well as good practices in the social policy field in the member states, so as to contribute to better policy making.

The evaluation report should highlight the strengths and weaknesses of Eurocarers' work under the EaSI programme since 2014, and make recommendations for strengthening this work in future.

The evaluation report should be structured around the following elements:

- 1) Evaluation of EaSI work programme to date
- 2) Input recommendations into implementation of 2017 work programme (and beyond)
- 3) More general review of governance structures and strategic direction of Eurocarers

### III. Evaluation indicators

The evaluation of the EaSI work programme will be structured according to the organisation's *quadrennial strategic action plan*, taking into account the specific objectives set up by the European Commission, the strategic objectives of the organisation, the activities planned and will be notably based upon the indicators established within the ***performance measurement plan***.

Alongside an evaluation of whether these indicators are being achieved, questions to be asked will include:

- Are these the right indicators for success? Would other indicators be also relevant?
- Is Eurocarers on track to reach its objectives?
- If not, what could be changed to make this possible?
- What lessons can be learnt from the first years of the project which will improve the identification of objectives and activities, and their realisation, in 2017?

There will also be a more general, strategic focus to the evaluation. This element will address the following questions:

- Does Eurocarers have a clear, relevant and realistic strategy for the coming years?
- Is Eurocarers anticipating future changes in funding, political direction, membership needs, and other elements in order to ensure its ongoing viability?

- Does Eurocarers have the resources necessary in order to achieve its goals (financial, Board, Secretariat, members)?
- What changes could be made to ensure that Eurocarers has the strategy, governance, and resources in future?

This second element of the evaluation will also consider the following aspects of Eurocarers' performance:

- Functioning of network
- Translation of Strategies (top-down/bottom-up)
- Study Visits and other events (Quality and Attendance)
- How much have Eurocarers engaged members on EU?

#### **IV. Methodology and Approach**

The evaluation will consist of the following phases:

- Planning and design;
- Gathering and analysing the data, including through semi-structured interviews and document review;
- Identifying the evaluation findings, conclusions and recommendations;
- Preparing interim and final reports containing the findings of the evaluation.

**The evaluation report of the work programme under the EaSI Programme** will comprise of reviewing the extent to which the work programme has been fulfilled, through an examination of the outputs produced under the contract.

This phase of the evaluation process will mostly consist of a document review exercise, to be supplemented by interviews with key Eurocarers secretariat staff.

Documents to be reviewed will include the work programme, internal governance documents, and all materials and written output produced under the framework of the contract, including agendas and minutes of meetings, internal and external communications materials, training materials and outputs, as well as policy analysis, briefings, and recommendations documents.

Furthermore, the consultant will also undertake a more **qualitative review of Eurocarers' governance and strategy, focusing upon strengthening Eurocarers' organisational capacity and the advocacy and campaigning skills of members.**

This element will include a review of relevant internal documents. Specific elements to be reviewed will include:

1. Policy and advocacy activities
2. Participation of Eurocarers in European projects
3. Study visits and other events
4. AGM

Activities undertaken, and internal processes, will be evaluated through a combination of methodological tools. These will include notably:

- Structured interviews with Board members, Secretariat staff, member organisations,
- Analysis of the outcomes of the mapping exercise launch in 2016
- Evaluation through interviews with external stakeholders,
- Review of evaluation forms of the Eurocarers General Assembly,
- Document review, analysing strategy and planning documents

## **V. Budget and Deliverables**

Consultants are expected to submit a detailed offer on the basis of the terms of reference defined in this document, including a CV and a short presentation of their approach to evaluating NGOs.

The deliverables for the evaluation are as follows:

### **a. Interim Report**

To be delivered by the 15<sup>th</sup> January 2017

This will consist of a draft interim report incorporating both quantitative and qualitative elements of the evaluation. This should be focused on the specific objectives set up by the European Commission 'a' and 'b'.

### **b. Final evaluation report**

To be delivered by the 15<sup>st</sup> February 2017.

This final report will encompass both a review of the implementation of the EaSI work programme, - focusing on the four overarching objectives defined by the European Commission (see points a to d on page 2) - and a more general analysis of Eurocarers' strategic planning.