1. Programme summary and background
Inclusion Works is a consortium programme of 11 partners, led by Sightsavers, focusing on the economic empowerment of people with disabilities. Inclusion Works brings together an experienced and diverse range of partners who, through strong collaboration, will create and test innovative approaches to improve the long-term economic empowerment and inclusion of people with disabilities in Bangladesh, Kenya, Nigeria and Uganda. The 3-year programme is funded by the UK Aid through the UK Aid Connect funding mechanism with a budget of £ 12,816,276 (£11,461,573 in implementation) within a time frame from July 2018 – March 2022.

The Inclusion Works consortium has disabled people’s organisations (DPOs) at its core and works directly with people with disabilities, other NGOs, and prospective private and public employers to demonstrate scalable models that are underpinned by the UN Convention on the Rights of Persons with Disabilities (CRPD), on how people with disabilities can participate equally in the workplace. It aims to create opportunities for all persons with disabilities, including those from under-represented and marginalised groups.

At national level, the programme will foster new partnerships between the public and private sector, such as Safaricom and Standard Chartered, national employer federations, trade unions and a range Disability People’s Organisations (DPOs), to identify how labour market systems can be influenced to facilitate the formal sector employment of women and men with disabilities. The programme is employing a differentiated and context specific approach in each of the programme countries. In Bangladesh, it will promote inclusive employment within civil society itself and work to strengthen coordination across existing inclusive employment focused initiatives. In Kenya, the programme will work with the government and the private sector to strengthen the accountability mechanisms required to implement the government’s 5% quota for employment of people with disabilities. In Nigeria, the newly enacted Disability Bill provides the foundation for strengthening the disability movement’s capacity to support the government and employers to implement inclusive employment legislation and practices, while in Uganda, the focus is on strategies to better match labour market supply and demand, in partnership with the Federation of Ugandan employers.

The country-specific project designs are differentiated according to context and opportunities, and will provide a wealth of learning. Evidence on what does, and does not work to increase the employment of women and men with disabilities will then be used at national level to influence policy-makers in the public and private sector, leading to improved systems, policies and practice, which will increase the employment of women and men with a range of disabilities. The programme will also globally amplify knowledge gained though creating linkages with global initiatives such as the UN Global Compact, UN Convention on the Rights of Persons with Disabilities (UNCRPD), the #Valuable campaign and the Ethical Trading initiative.

The specific aims and objectives of the programme, as captured in the Results Framework, are:

**Impact objective -**
*Increased action and investment from private, public and civil society actors to enable economic inclusion for women and men with disabilities through employment; in line with UN*
Convention on the Rights of Persons with disabilities (UNCRPD) and Sustainable Development Goal 8.

Outcome objective –
Generation and dissemination of effective, innovative and UNCRPD compliant evidence of what works to enable inclusive employment of women and men with disabilities

By April 2022, the programme will generate and share an estimated 30 learning products with a reach of approximately 15,000 stakeholders. The uptake of programme evidence and learning by global stakeholders will be monitored throughout the programme to demonstrate its overall impact.

Output areas –
1. Partnerships between private, public and civil society are developed to influence the inclusion of women and men with disabilities in formal employment
2. Up to 2000 women and men with disabilities have enhanced skills to access formal employment (as a result of programme interventions)
3. A targeted 180 employers test and adopt innovative UNCRPD compliant practices that enable the inclusion of women and men with disabilities in formal employment.
4. The disability movement and supporting stakeholders (an estimated 18 media organisations and over 200 DPOs) demonstrate strengthened capacity to support women and men with disabilities to realise their rights to work (Article 27)
5. Government demonstrates commitment to enabling inclusion of women and men with disabilities in formal employment through creation and/or implementation of inclusive legislation/policy as a result of programme interventions.

A robust monitoring, evaluation and learning (MEL) framework sits alongside the results framework, incorporating our programmatic theory of change and outlining our approach in using evidence to support adaptive management processes.

2. Purpose of programme evaluation
The overall purpose of programme evaluation is to conduct an evidence-based, highly consultative and participative, analytical reflection on the different components of the Inclusion Works programme. The scope of this will include:

- National and regional activities and results
- Global level influencing activities and impact
- Evidence and best practice generated by the programme
- Assessing progress towards achieving inclusive development programming informed by the UNCRPD

Evaluation activities will provide additional, independent perspectives to those generated by the existing consortium learning processes, and will serve as complementary evidence to share with the wider private, public and civil society sectors. Evaluation will also support the upwards and downwards accountability structures and processes by validating achievements and programme progress.

The key users and audience for programme evaluation findings and recommendations will be the programme management unit (PMU) and programme Executive Group, country implementation teams and partner organisations/companies, consortium partner organisations and DFID. In addition, the programme will seek opportunities, as appropriate, to share findings with wider disability and employment stakeholders such as other DFID Aid Connect consortia (e.g. Leonard Cheshire consortium – Innovations to Inclusion programme), DFID Disability Inclusive Development (DID) programme stakeholders, ILO, and the Global Business Disability Network, and through networks such as the Bond Aid Connect Group.
This will maximise synergies and effectiveness of learning e.g. through shared platforms for lessons learnt with related programmes, possible meta-evaluations, other joint-learning opportunities etc. Evaluation findings and recommendations will be disseminated in a variety of knowledge sharing formats to match audiences’ information needs.

The IW consortium is keen for the evaluation activities to align with the adaptive programme management principles employed, which are core to the programme governance and reporting structures. Evaluation will form a holistic part of the MEL framework, aligning to the internal monitoring and learning processes to provide evidence of programme progress, achievement and learning. This will contribute to testing the programme theory of change.

3. The Overall Evaluation Approach

The programme will be evaluated through three independent, but linked, evaluation exercises; one at the end of each year, as described in the section below.

The overall evaluation of the programme will be split into three evaluation stages. To ensure the programme utilises robust evidence and experience to continually learn, adapt and improve, we have identified the need for a formative, annual reflection at the end of the first 2 years of programme operations, focusing mainly on practice, process, and products. These formative evaluations will be in addition to a more summative overall programme evaluation at the end of the programme. This structuring is based on a developmental evaluation approach, whereby specific evaluation focus and lines of enquiry are developed over time to respond to emerging findings and priorities, while providing enough coherence and structure to the evaluation function for the full programme term.

In this approach there will therefore be:
- Two formative evaluation cycles (year 1 and year 2 of implementation) and,
- One summative evaluation cycle (end of year 3 of implementation).

These three evaluations will focus on 2 dimensions:

1. How the programme has progressed in terms of planned implementation to date towards achieving its programmatic objectives? (Are we doing what we said we would?)

2. What sort of evidence and learning has the programme produced to date, does this support or refute the programme theory of change and assumptions, and has the evidence and learning generated influenced wider change? (What have we been able to achieve, including in implementing inclusive programming?)

Both of these dimensions would be reviewed and evaluated, to a greater or lesser degree, by an external evaluator on an annual basis; with the specifics and methodology developed and directed by the Evaluation Steering Group (ESG) annually. Section 4 below gives the specific terms of reference of this tender for the Year 1 Evaluation.

These three evaluation processes will align with the programme monitoring and learning framework to ensure a holistic picture of the programme in terms of progress and impact, and to avoid duplication. It is envisaged therefore, that the evaluation approach will help to provide an external validation/layer of accountability for the evidence and learning produced by the programme (outcome) and the influence achieved (impact), as well as deepening understanding of innovative implementation processes. The evaluations will explore and utilise opportunities to engage and involve programme stakeholders including DPOs and employers, exploring a combination of external and self-evaluation methodologies, and will
take advantage of existing embedded programme learning and engagement mechanisms to avoid the risk of ‘consultation fatigue’. For example, there may be opportunities for programme evaluations to engage with the specific DPO coordination mechanisms, country steering committees and/or the Action Learning Groups, which are being set up as part of the programme learning and implementation structures.

Each annual evaluation will provide a set of findings and recommendations based on the specific terms of reference for that evaluation exercise.

For continuity, the ESG may select the same evaluator to conduct all 3 evaluations depending on whether the individual/team has the required skills and expertise for the focus and scope of each annual evaluation. This will be considered after the completion of year 1 evaluation, and the Terms of Reference for Year 2 and Year 3 evaluations will be released at the appropriate point during those years.

The budget for these evaluations will be allocated on an incremental basis across the programme term to reflect the increasing level of effort/input required at each stage, as the evaluations move from formative to summative orientation. The approximate allocation to individual evaluations is likely to be 20%/30%/50% of the total evaluation budget, for each evaluation, respectively.
4. End of Year 1 Evaluation – Terms of Reference

4.1 Purpose of Year 1 Evaluation

The purpose of the formative evaluation is to conduct an evidence-based, analytical reflection on the different components of the Inclusion Works programme. Formative evaluations aim at improving the programme design and implementation with a view to improve performance through adaptive management processes. The year 1 evaluation will be formative in nature in order to support and inform implementation during the following years. Therefore, this year 1 evaluation will have a strong focus on Dimension 1 above (section 3), although consideration should also be given to Dimension 2, as findings on this may emerge during the process.

This programme is innovative in the way it is designed and being implemented, and it is trying new ways of working in partnership, both within and beyond the programme consortium. Therefore, it is desired that this formative, process evaluation in year 1 will be a supportive, reflective exercise that will support the adaptive management approach taken by the programme. It should provide constructive assessment of how current implementation and processes are supporting, strengthening and progressing the aims of the programme, and it should provide clear and actionable recommendations for the next year of the programme.

4.2 Scope

The focus of the Year 1 evaluation will be on the process of implementation of the programme to date, and therefore will assess whether the results-orientated and learning processes, tools, systems and governance structures put in place and currently operating are likely to facilitate and ensure the achievement of the overall programme aims and objectives. The evaluation will be conducted in a reflective and analytical manner, working alongside existing M&E practices and programme learning workstreams to provide an external validation and assessment of progress to date, and recommending any possible adjustments to programming that might be required to support the overall programme aims.

In terms of programme processes, tools, structures and systems, this will include, but not be limited to, a review and consideration of the programme’s:

- Processes by which evidence and learning are generated and validated by the programme
- Programme theory of change and its assumptions
- The way in which the consortium governance structure and workstreams support programme objectives

The year 1 evaluation will explore and assess the current progress of the innovative and new ways of working which the programme is adopting and seeking to promote. Thus, some cross-cutting issues should also be explored in the evaluation:

- Inclusive programming approaches
- Reaching the most marginalised
- Sustainable inclusive employment practice

This year 1 evaluation will not be considering the impact objectives of the programme. That area will be addressed in subsequent evaluations.

1 Specifically disability and gender inclusion
Specific Evaluation Questions to be addressed

1. In regard to the programme’s learning and knowledge sharing processes, tools, systems and structures that in place (or planned), are these facilitating and strengthening programme implementation processes, and are they likely to support the generation of evidence and desired programme results?

2. Has any learning which has emerged to date informed the programme’s theory of change and its assumptions, either to validate or refute these?

3. Given the exploratory and innovative nature of the programme, is there sufficient coherence, capacity and agility across the programme governance structures and relevant workstreams to support adaptive management to meet programme objectives?

Cross-cutting areas:

4. To what extent has the aspiration of inclusive programming processes been realised or demonstrated?

5. In regard to inclusion principles, has the programme yet been able to develop strategies for reaching the most excluded and marginalised?

6. How is the assurance of sustainable inclusive employment practice beyond the programme term being considered at this stage, and/or are there processes planned for this?

The evaluation will assess the programme period 1st July 2019 – 30th April 2020. See detailed timeframe in section 4.5 below.

4.3 Methodology

The exact methodologies and tools to address the evaluation scope and lines of enquiry embodied in the specific evaluation questions will be determined through discussion with the successful candidate and the Evaluation Steering Group during the start-up and inception stage of the evaluation. It is envisaged that the formative evaluation will be mainly desk-based using secondary data. However, some key informant interviews of programme staff (by skype or other means) will be needed in order to gain programme management and implementation perspectives on what has gone well, or what has been challenging. Sampling will be purposive in nature, and it is possible there may be an element of ‘snowballing’\(^2\) to identify further information sources as the evaluation progresses. If the evaluation budget allows, and depending on the country where the evaluator is based, it is also possible that the evaluator might take part in one of the programmed overseas learning events in order to observe processes and outcomes of these.

It is not anticipated that any significant primary data collection will be undertaken in this evaluation, such as wider stakeholder interviews etc. with programme participants or target groups at this stage. As mentioned, this evaluation is focused more on implementation processes than on programme outcomes at this point, and the programme is already undertaking extensive consultation/engagement with stakeholders during inception and early implementation stages, although if opportunities arise for engaging with additional stakeholders, they will be considered, e.g. with employers participating in the programme.

\(^2\) A method whereby initially identified information or informants lead to further sources of information or informants
The two subsequent evaluation exercises envisaged for end of year 2 and year 3, will more closely consider and assess achievements of intended outcomes and impact, although where evidence of programme achievements is identified during this Year 1 formative exercise, it should also be captured and reported on in this evaluation.

The year 1 evaluation will provide a set of findings and recommendations aligned to the scope areas by addressing the detailed Specific Evaluation Questions, and produce a draft and final evaluation report detailing these.

The findings and recommendations will feed into the Annual Programme Review process that is scheduled in August-Sept 2020. The programme will develop a management response to the evaluation, which will be formulated alongside planning and actions for year 2 of the programme.

4.3 Evaluator requirements

The programme is looking for an individual consultant or team who can provide the following skills, competencies and expertise to undertake the Year 1 evaluation:

**Essential**
- Evaluation expertise and experience, ideally of multi-country programmes and/or consortium/partnership programmes
- Understanding of adaptive management programming and formative evaluation
- Experience of working with organisations of persons with disabilities (DPOs)
- Demonstrated experience of working on human rights (UNCRPD) and disability inclusion

**Desirable**
- Experience of good knowledge management and learning practice and principles
- Understanding or experience of labour market programmes
- Personal/lived experience of disability would be an asset

It may be desirable to consider the same consultant, individually or as part of a team, to undertake later evaluations, subject to satisfactory performance in the Year 1 and the ability to provide the relevant skills and competencies to address the likely extended scope and focus of Year 2 and Year 3 evaluations.

4.4. Budget and contract

Interested individuals/teams should apply via the Expression of Interest (EOI) process outlined.

The EOI should include: a proposal of how the assignment would be undertaken, which demonstrates a clear understanding of assignment; the roles of the evaluator/s; number of days input on the various areas of work; a timeframe for work to be conducted; and a budget with daily fee rates for the assignment and any other anticipated expenses. Applicants will be shortlisted by a selection panel from the consortium according to an appropriate and transparent selection process.

The following broad areas of activity are envisaged for the evaluation by the evaluator:

1) Development of a frame of analysis and data collation/collection plan and process.
ii) Thorough and extensive desk review and analysis of available programme data and reports, wider programme documentation, quarterly reports, work plans, strategy documents, learning framework and mechanisms and M&E framework.

iii) Planning and undertaking any necessary interviews or consultations with key informants that are needed to supplement secondary data and information.

i) Production of a draft Evaluation Report for extensive stakeholder review.

ii) Revision of draft Evaluation Report as necessary.

iii) Submission of final Evaluation Report taking account of comments on the draft version/s.

The detailed approach and methodology will be discussed and determined by the successful applicant in collaboration with the programme management unit/Evaluation Steering Group during the kick-off and inception phase stage of the evaluation.

The anticipated budget for the Year 1 evaluation, including all expenses (expenses incurred by the evaluator directly as well as any indirect costs incurred by the consortium partners for logistics, travel etc.) is £15,000 including VAT.

The programme will cover any reasonable expenses agreed in advance in writing/email for travel or phone calls. The evaluator/team is expected to cover all other costs and materials not mentioned above related to this exercise as part of their daily fees or equipment (e.g. laptops).

**SCHEDULE OF PAYMENT**

The following payment schedule will be adhered to:

- On acceptance and approval of inception report: 40%
- On acceptance and approval of final report: 60%

**4.5 Timeframe**

The evaluation will be timed to coincide with the programme implementation year, running from July to June each year, and align with existing data collection and reporting timeframes.

**The Year 1 Evaluation indicative timings:**

- The award of evaluation contract – **end of Feb 2020**
- Evaluation activities - data collection, collation and analysis – **March and April 2020:**

*This period will include the following programme reporting periods:*

- **Quarterly Review report** (1 Jul – Sep 19): submitted October 2019; followed by Programme Review November 2019
- **Quarterly Review report** (3 Jan – Mar 20): submitted April 2020; (please note: the Programme Review May 2020 will be outside the evaluation period)
- **Country Learning Review:** April 2020

- A draft evaluation report providing findings and recommendations should be developed during May and submitted by **end of May 2020**

- **Period of review by evaluation stakeholders – e.g. ESG members, technical and programme staff, country staff and programme participants in country during June 2020**
Revisions by evaluator during **July 2020**

A final evaluation report, taking feedback into account, should be delivered by **31st July 2020**

The consortium will develop and complete a management response to evaluation findings and recommendations by **Sept 2020** to align with the Annual Programme Review process.

4.5 Outputs and Deliverables

- Inception report – 3rd week of March 2020
- Draft final report – 31st May 2020
- Final report – 31st July 2020

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**APPENDICES**

Indicative list of documents and data to be made available during the evaluation:

- Programme proposal
- Budget
- Programme summary document
- Results Framework
- Theory of Change
- Annual report from co-creation?
- Learning Framework Note (under development)
- Learning Framework structure (diagram)
- Quarterly and annual donor reports (narrative and financial)
- Quarterly report review process results
- Gender Action Plan
- MEL Handbook
- Governance documents
- Reports of implementation workshops in country
- Communications Strategy/Plan

List of learning and evidence generation mechanisms that are likely to be used in the programme:

- International Online Resource Centre (Source) – online platform for hosting and disseminating programme evidence products acting as a learning architecture for cross programme learning.
- Action Learning Groups (in country) – participatory methodology to gather feedback and experience on programme interventions from participants and key stakeholders
- Learning Survey tool – platform to generate learning/feedback about consortium working from project consortia partners and country implementation teams
- Programme Annual Reviews (methodology under development)
- Bi-annual Country Learning Reviews (methodology under development)