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STATEMENT OF WORK EXTERNAL EVALUATION OF THE MARAWI RESPONSE PROJECT (MRP)

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ACRONYMS

AMELP	activity monitoring, evaluation and learning plan
AMT	activity management team
AOR	agreement officer representative
CAME	complexity aware monitoring and evaluation
CDCS	Country Development Cooperation Strategy
CLA	collaboration, learning and adaptation
CLAimDev	Collaboration, Learning and Adaptation for Improved Development
COP	chief of party
COR	cooperative agreement representative
DCOP	deputy chief of party
DDL	Development Data Library
DEC	Development Experience Clearinghouse
DO	development objectives
ECOWEB	Ecosystems Work for Essential Benefits
FGD	focus group discussion
IDP	internally displaced persons
HCM	host community members
IP	implementing partners
KII	key informant interviews
LOE	level of effort
MARADECA	Maranao People Development Center
MRP	Marawi Response Project

MSME	medium and small sized micro-enterprise
NGO	non-government organization
OEDG	Office Of Economic and Democratic Governance
PI	principal investigator
PIRS	performance indicator reference sheet
PRM	Office of Program Resource Management
RF	results framework
SOW	statement of work
STTA	short-term technical assistance
SURGE	Strengthening Urban Resilience for Growth with Equity
ToC	theory of change
USAID	United States Agency for International Development
VEO	violent extremist organizations

ACTIVITY SUMMARY

TABLE 1. SUMMARY INFORMATION

Activity Name	Marawi Response Project (MRP)
Implementing Partner	PLAN International
Cooperative Agreement number	72049218CA00007
Total Estimated Cost (TEC)	US\$25,000,000
Period of Performance	September 2018–September 2021
Active Geographic Regions	Lanao del Sur, Marawi City, Lanao del Norte, and Iligan City
Country Development Cooperation Strategy	CDCS 2016-2019
Development Objective	DO2: Improved peace and stability in conflict-affected areas of the Philippines, particularly Mindanao
Evaluation Type	External performance evaluation

BACKGROUND

The USAID-funded Marawi Response Project (MRP) supports people and families who were internally displaced by the 2017 Marawi siege,¹ resulting from armed conflicts between the Armed Forces of the Philippines and ISIS-inspired militants in Marawi (Lanao del Sur), Philippines. USAID selected PLAN International to implement the activity, which lasts from September 2018 to September 2021.

USAID/Philippines designed MRP in line with its medium-term strategic goal to support the reintegration or return of internally displaced persons (IDPs), particularly those with an uncertain likelihood of returning to Marawi. Work toward USAID/Philippine’s medium-term strategic goal has been conducted in two phases.

Completed in mid-2019 through the joint efforts of various partners, the first phase focused on addressing the early recovery needs of displaced individuals (Objective 1) and their transition to social and economic stability (Objective 2). The second phase focused on continuing the pursuit of transitioning to social and economic stability (Objective 2) and establishing the conditions for local governments and communities in and around Marawi to address their long-term rehabilitation needs (Objective 3) through the Marawi Response Project. MRP thus became USAID’s primary Marawi response effort, integrating and building upon various new and ongoing USAID/Philippine’s activities operating in and surrounding Marawi. The lessons learned from MRP are essential to guiding USAID’s interventions in similar contexts.

¹ Also referred to as the Battle of Marawi or the Marawi crisis.

CHALLENGE

MRP assists IDP families who are in the *early emergency* and *transitional reintegration* phases of displacement.² MRP is responding to the numerous challenges that both IDPs and their host communities face such as having lost their homes, property, and livelihoods. Additional challenges include a mutual feeling of being marginalized and neglected, and tension between IDPs and host communities.

When IDPs and host communities lack confidence in the local government's ability to address these challenges, tensions may increase and the challenges may become crises. Unaddressed crises or crises that are not addressed sufficiently have the potential to become conflicts of their own. Moreover, violent extremist organizations (VEO) can manipulate such tensions to further destabilize the area.

RESPONSE

MRP works to improve economic conditions and increase social cohesion among IDPs and their host communities in Marawi and nearby municipalities. The activity conducts interventions to revive economic livelihoods, support business recovery, and provide employment opportunities. It has also applied community capacity development approaches such as advancing leadership opportunities, strengthening organizations, and ensuring active civic participation among marginalized groups. MRP partners with local government units, government agencies, civil society groups, and the private sector. MRP additionally works with local partners, including Ecosystems Work for Essential Benefits (ECOWEB) and Maranao People Development Center (MARADECA).

MRP's experiences operating in complex and frequently high-threat environments in Mindanao provide valuable lessons to USAID/Philippines for evolving appropriate implementation approaches and managing activities in similar environments. The activity's COVID-19 adaptations provide additional lessons.

THEORY OF CHANGE

MRP's theory of change states:

If... IDPs, returnees, and host populations actively participate in and contribute to the social and economic development of their communities in a manner that reduces inter- and intra-community tensions and fosters resilience,

then... they will be more self-reliant and better enabled to advance solutions to their displacement.

GOAL

MRP's goal is to support IDPs and their host communities in becoming more self-reliant and finding long-term solutions to displacement. This is based on the perspective of transitioning from displacement and is consistent with USAID's approach to operating in dynamic environments. Thus, the activity's high-level impact is advancing long-term and durable solutions to support local integration of IDPs.

² According to *USAID Assistance to Internally Displaced Persons Policy Implementation Guidelines*, there are four phases of displacement: (1) pre-emergency preparedness, (2) early emergency, (3) transitional reintegration, and (4) long-term development.

RESULTS FRAMEWORK

Table 2 details MRP’s results framework.

TABLE 2. MRP RESULTS FRAMEWORK	
RESULTS LOGIC	RESULTS STATEMENTS
High-Level Impact	A durable solution: IDPs integrated into local communities
Manageable Impact	Self-reliance of IDPs and host community members improved
Intermediate Results and Outputs	IR 1: Economic conditions of IDPs and host communities improved
	Output 1.1: Business recovery opportunities expanded
	Output 1.2: Employment opportunities expanded
	Output 1.3: Livelihood opportunities expanded
Performance Indicators	IR 2: Social cohesion of IDPs and host communities strengthened
	Output 2.1: Social cohesion grants provided to host and displaced communities
	Output 2.2: Social cohesion training provided to host and displaced communities
	<ul style="list-style-type: none"> ● Indicator 1: Level of self-perceived self-reliance of assisted displaced and host community members ● Indicator 2: Number of displaced business owners with new or re-started businesses ● Indicator 3: Percentage of trained internally displaced persons/host community members who are gainfully employed ● Indicator 4: Number of displaced business owners who benefitted from business recovery micro-grants ● Indicator 5: Number of displaced business owners trained in enterprise management ● Indicator 6: Number of displaced persons/host community members trained in workforce readiness and life skills ● Indicator 7: Number of displaced/host community members who benefitted from micro grants ● Indicator 8: Level of polarization between host and displaced communities ● Indicator 9: Level of self-perception of public representation ● Indicator 10: Number of displaced/host community members who benefitted from social cohesion grants ● Indicator 11: Number of displaced/host community members trained

EVALUATION DESIGN

PURPOSE

The objectives of this performance evaluation are to: (1) assess MRP's performance in achieving its target outcomes and outputs through the activity's planned strategies and interventions; (2) identify and learn from the factors that influenced implementation and results; and (3) gather insights and recommendations to inform successful implementation of other activities in similarly complex environments.

AUDIENCE

The target evaluation audience includes the following groups and individuals: USAID/Philippines, USAID/Regional Development Mission for Asia, USAID/Washington, Marawi rehabilitation stakeholders, local communities, NGOs, local government units, and Philippines government agencies. In collaboration with USAID/Philippines, the evaluation team, will develop an evaluation dissemination and learning plan to reach the target audience.

FRAMEWORK

Figure 1 illustrates the scope of the evaluation and identifies the key activity elements that require data collection and in-depth analysis. The framework also suggests analyzing the interrelationships between the different key elements to better understand the factors contributing to MRP's outputs and outcomes. Each element of Figure 1 is first explained directly below.

GENERAL ENVIRONMENT

There are an array of external factors that influence the way MRP is implemented and the results it achieves. These include the local environment, technology, economic conditions, demographics, sociocultural forces, and political or legal factors.

SPECIFIC ENVIRONMENT

The specific environment refers to the beneficiaries, families, communities, organizations, leaders, business sector, local government units, government organizations, NGOs, and other important actors who are directly and indirectly involved in implementing MRP.

PURPOSE

The overall intention of the activity includes the theory of change/development hypotheses and all other information related to institutional mandates that guide the activity's implementation.

OUTPUTS AND OUTCOMES

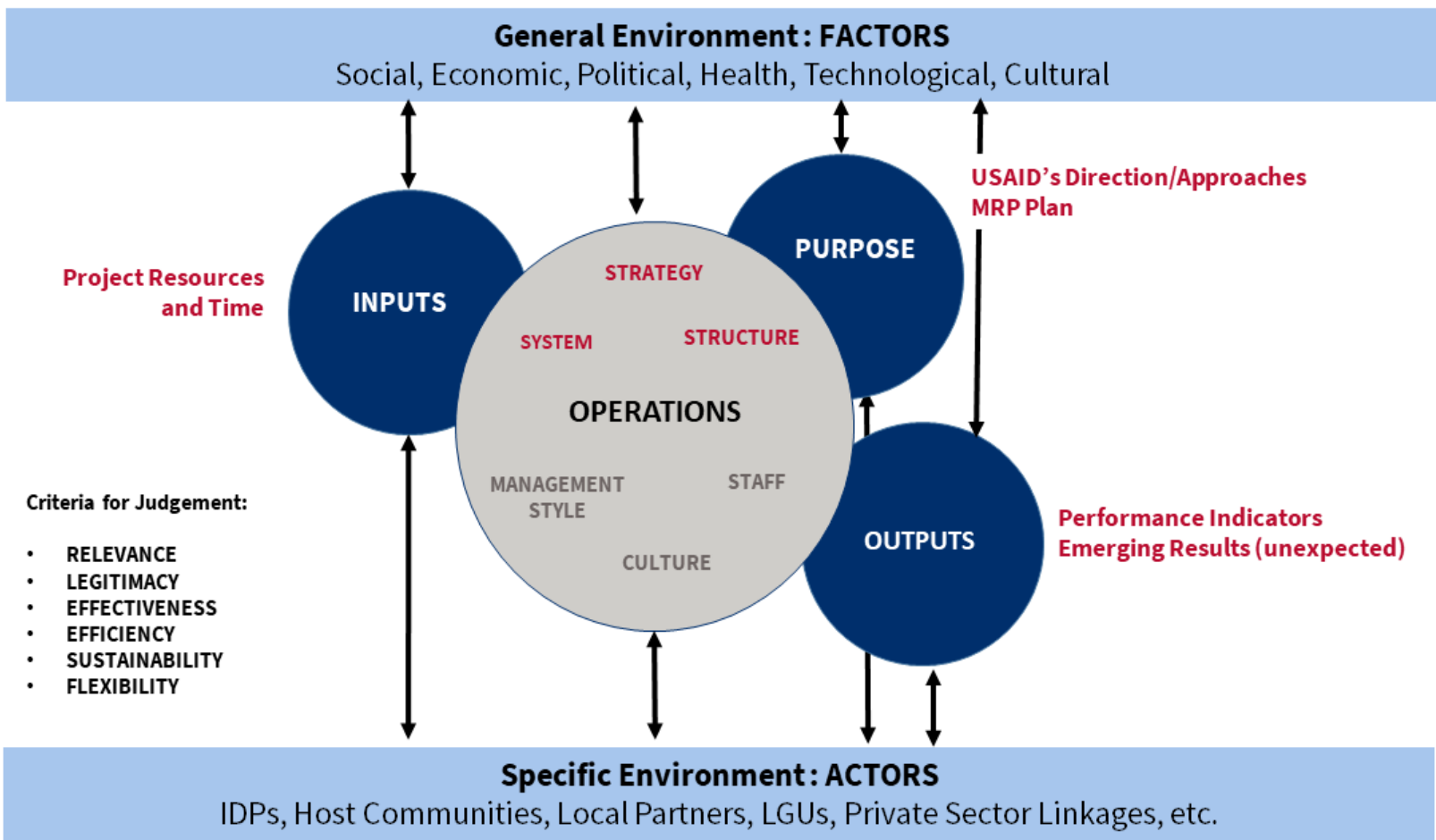
Outputs and outcomes refer to information about MRP's intended and unintended results. This evaluation will thus consider and integrate the three outcome indicators that MRP's baseline study highlights, namely: level of self-reliance, level of polarization between host and displaced communities, and level of participation (i.e., the voice or level of representation of IDPs in their new locality). The units of analysis for outputs and outcomes are individual (i.e., IDPs and host community members) and groups (e.g., micro, small, and medium-sized enterprises (MSME) and community groups).

INPUTS

Inputs are information related to the materials, and financial, human, and other resources used to implement the activity.

OPERATIONS

Operations refers to how the activity was implemented and managed, including service delivery systems and processes. This will also include the management structure, leadership styles, organizational culture, and other internal management mechanisms that describe activity operations.



EVALUATION QUESTIONS

The overarching questions that this external performance evaluation aims to answer are:

1. In what ways did MRP contribute to IDPs and their host communities becoming more self-reliant and finding long-term solutions to displacement?
2. How did the complex environment in Marawi affect the implementation of MRP?

The evaluation will focus on three evaluation criteria: the relevance, effectiveness, and sustainability of MRP interventions. The evaluation will contextualize its findings, conclusions, and recommendations based on changes in the social environment in Marawi and in host communities.

RELEVANCE

- In what ways has MRP contributed to integrating IDPs into host communities as a durable solution for addressing their needs?
- In what ways is MRP aligned with USAID's approach to operating in complex environments?
- In what ways is MRP aligned with the Government of the Philippines' approach to transitioning displaced families to safer communities and restoring livelihood and income opportunities?

EFFECTIVENESS

- To what extent has MRP achieved its intended outcomes in improving the self-reliance of IDP communities?
- To what extent was MRP able to improve economic conditions for IDPs and host community members?
- To what extent has MRP been able to strengthen the social cohesion of IDPs and host communities?

SUSTAINABILITY

What mechanisms have evolved out of MRP interventions to sustain and further improve economic conditions for beneficiaries and social cohesion between IDPs and host communities?

CONTEXT

What changes in the social environment enhanced or inhibited MRP's implementation and contributed to the status of IDPs and host communities?

TABLE 3. EVALUATION DESIGN MATRIX

QUESTIONS	SUGGESTED DATA SOURCES	SUGGESTED DATA COLLECTION METHODS	SUGGESTED DATA ANALYSIS METHODS
Relevance			
<ul style="list-style-type: none"> • In what ways has MRP contributed to integrating IDPs into host communities as a durable solution for addressing their needs? • In general, in what ways is MRP aligned with USAID's approach to operating in complex environments? • In what ways is MRP aligned with the Government of the Philippines' approach to transitioning displaced families to safer communities and restoring livelihood and income opportunities? 	<ul style="list-style-type: none"> • Activity documents and reports • IPs and key stakeholders • USAID personnel 	<ul style="list-style-type: none"> • Document review • End-line survey on beneficiaries' perceptions and their economic conditions • Stakeholder feedback (survey, key informant interviews [KII], and focus group discussions [FGD]) 	<ul style="list-style-type: none"> • Qualitative analysis • Quantitative analysis
Effectiveness			
<ul style="list-style-type: none"> • To what extent has MRP achieved its intended objectives relative to improving the self-reliance of IDP communities? • To what extent was MRP able to improve economic conditions for IDPs and host community members? • To what extent has MRP been able to strengthen the social cohesion of IDPs and host communities? 	<ul style="list-style-type: none"> • Activity documents and reports • IPs and key stakeholders 	<ul style="list-style-type: none"> • Document review • End-line survey on beneficiaries' perceptions and their economic conditions • Stakeholder feedback (survey, KII, FGD) 	<ul style="list-style-type: none"> • Qualitative analysis • Quantitative analysis • Metadata analysis • Impact Analysis (using treatment and comparison groups, randomized sampling methods, etc.)
Sustainability			
<ul style="list-style-type: none"> • What mechanisms have evolved out of MRP interventions to sustain and further improve economic conditions for beneficiaries and social cohesion between IDPs and host communities? 	<ul style="list-style-type: none"> • Activity documents and reports • IPs and key stakeholders 	<ul style="list-style-type: none"> • Document review • Stakeholder feedback (survey, KII, FGD) • Most significant change and/or outcome harvesting methods (FGD, KII) 	<ul style="list-style-type: none"> • Qualitative analysis • Quantitative analysis

TABLE 3. EVALUATION DESIGN MATRIX

QUESTIONS	SUGGESTED DATA SOURCES	SUGGESTED DATA COLLECTION METHODS	SUGGESTED DATA ANALYSIS METHODS
Context			
<ul style="list-style-type: none"> • What changes in the social environment enhanced or inhibited activity implementation and have contributed to the status of IDPs and host communities? 	<ul style="list-style-type: none"> • Activity documents and reports • IPs and key stakeholders 	<ul style="list-style-type: none"> • Document review • KII • FGDs • Context evaluation tools (e.g., sentinel indicators) using USAID and MRP context indicators 	<ul style="list-style-type: none"> • Qualitative analysis • Quantitative analysis

APPROACHES AND GUIDING PRINCIPLES

PERFORMANCE EVALUATION

This external performance evaluation will assess the ways and extent to which MRP met its goal and objectives. It will draw on MRP’s 2019 baseline study results and conduct an end line survey to measure the project’s effect on three key outcome indicators: self-reliance, polarization, and public participation of the IDPs in host communities.

In addition to considering MRP’s quantitative and qualitative accomplishments (actual versus target), the evaluation will also measure how well MRP has complied with the data quality standards that were defined in the performance indicator reference sheet (PIRS) of the activity’s approved activity monitoring, evaluation, and learning plan (AMELP).

This evaluation will also determine MRP’s relevance in terms of its contribution to and potential influence on the broader goals and strategies of the Mission, especially with respect to managing activities in complex situations.

MRP AS A TRANSITIONAL ASSISTANCE INITIATIVE

MRP is USAID’s special activity to provide humanitarian and developmental assistance to IDPs that are affected by armed conflict in Mindanao. The external evaluation will assess this activity using the framework in the *USAID Assistance to Internally Displaced Persons Policy*. Furthermore, it will consider the important guidance raised in the USAID Office of Transition Initiatives’ document, *Lessons Learned: Monitoring and Evaluation in Complex and High-Threat Environments*. In addition, the external evaluation will carefully consider using the IDP tools and frameworks that are provided in the *UN Guiding Principles on Internal Displacement*. USAID supports the goals of these principles and encourages its partners and host governments to use them as a practical reference.

COMPLEXITY-AWARE EVALUATION

Due to the complexities of the local environment and the onset of the COVID-19 pandemic during MRP implementation, the external evaluation will carefully consider USAID’s complexity-aware monitoring and evaluation (CAME) approaches.

GENDER EQUALITY AND SOCIAL INCLUSIVITY

Gender equality and social inclusion are important dimensions to be considered in measuring the success of MRP. The evaluation will thus consider whether and how MRP reduced gender disparities and other social disparities, empowered women and members of traditionally disadvantage groups, and mitigated the incidence of gender-based violence. Furthermore, the evaluation will reflect awareness of and respect to the local culture in terms of their values, traditions, language, communication mode, and style.

LOCATION AND GEOGRAPHIC SCOPE

The evaluation will gather information at the individual, community, and organization level in the 19 municipalities and 2 cities located within the two provinces of Lanao. Since many of the assisted IDPs have migrated to other locations, this evaluation will also attempt to trace and reach out to these individuals during data collection.

TABLE 4. MRP INTERVENTION AREA	
PROVINCE	CITY/MUNICIPALITY
Lanao del Norte	Iligan City, Baloi, Pantao, Ragat, Pantar
Lanao del Sur	Marawi City, Balindong, Buadiposo Buntong, Bubong, Butig, Ditsaan, Rammain, Kapai, Lumba Bayabao, Lumbaca Unayan, Lumbayanague, Madalum, Marantao, Masiu, Poona Bayabao, Piagapo, Saguwaran, Tubaran

DELIVERABLES AND REPORTING REQUIREMENTS

The following are the deliverables under this evaluation contract:

Table 5. Deliverables and Requirements

TABLE 5. DELIVERABLES AND REQUIREMENTS	
DELIVERABLES	REQUIREMENTS
Inception Report	<p>The report will include the following:</p> <ul style="list-style-type: none"> Evaluation design: detailed matrix, data collection instruments, potential informants/respondents/sites, and known limitations

TABLE 5. DELIVERABLES AND REQUIREMENTS

DELIVERABLES	REQUIREMENTS
	<ul style="list-style-type: none"> ● Work plan: schedule, logistical arrangements, key stakeholders, and areas to be visited ● Evaluation dissemination and learning plan: a description of the learning products and learning events that will be developed to disseminate the evaluation to the target audience
Briefing/Learning Events	<p>The evaluation team will conduct the following briefings:</p> <ul style="list-style-type: none"> ● Inception briefing ● Mid-term briefing and interim meetings to regularly update USAID/Philippines on the evaluation’s implementation status ● Out-briefing to present the draft report to USAID/Philippines ● Learning events (at least two) for key stakeholders to ensure utilization of the evaluation’s findings and recommendations
Draft Evaluation Report	<ul style="list-style-type: none"> ● Submit first as a draft to USAID/Philippines for comment.
Final Evaluation Report	<p>The final report and submission will:</p> <ul style="list-style-type: none"> ● Address and incorporate all comments raised by USAID/Philippines on the draft report ● Meet USAID quality standards for evaluation reports ● Include complete data and records that are properly-documented, and provided in an electronic format that is easily readable and well-organized. ● Be formatted using USAID branding and templates, and submitted electronically as a PDF file.

EVALUATION TEAM

EXTERNAL EVALUATION TEAM

The external evaluation team should be composed of experts with in-depth knowledge and understanding of evaluation and/or survey design and methodology, social cohesion, socio-economic interventions, humanitarian assistance in highly-complex situations (especially in the context of Mindanao cultures), and political conflict dynamics. At least one member of the team should have expertise in gender issues.

To reduce bias, evaluation team members shall not have been involved in the implementation of MRP in any recent, on-going or substantial way with the implementation of MRP. All team members will be required to provide a signed statement attesting to a lack of conflict of interest or describing any existing conflict of interest. The evaluation team shall demonstrate familiarity with USAID's Evaluation Policy.

The composition of the external evaluation team, and corresponding roles and responsibilities are as follows:

EVALUATION TEAM LEADER (1 STTA)

The evaluation team leader will oversee all aspects of the evaluation. They will manage the evaluation team's activities and ensure the work plan is implemented in a timely manner. They will also have primary responsibility for drafting and revising all evaluation deliverables.

TECHNICAL SPECIALISTS (2 STTA)

Two technical specialists will serve as co-evaluators to work closely with the evaluation team leader in implementing the work plan and analyzing data. The two specialists are expected to actively participate in formulating the data analysis frameworks, sampling design, and data collection tools. Each specialist is expected to conduct in-depth data analysis and write draft evaluation findings related to their respective subject matter, and submit them to the evaluation team leader for inclusion in the final evaluation report.

QUALITATIVE DATA ANALYST (1 STTA) AND QUANTITATIVE DATA ANALYST (1 STTA)

The quantitative and qualitative data analysts are tasked with developing the evaluation's data collection and consolidation platforms. The data analysts will implement quality control mechanisms to ensure data validity and accuracy. They will also analyze the field data using SPSS (for quantitative data) and NVivo (for qualitative data). They will additionally be assigned to develop data infographics to supplement the evaluation reports.

FIELD EVALUATION ASSISTANTS (3 STTA)

Three field evaluation assistants will conduct key data collection at the field level. Two will be assigned in Lanao del Norte and one will be assigned in Lanao del Sur. The field evaluation assistants will ensure all data collection activities are completed in their respective areas following standard protocols and data quality requirements.

The field assistants will guide the survey data collectors, who will administer the face-to-face end-line survey to identified respondents in their respective areas. They will also supervise the enumerators in conducting online tracking and reaching out to other beneficiaries/respondents who are no longer found in their respective activity locations.

PROJECT ASSISTANT (1 STTA)

The project assistant will assist the evaluation team with all logistical, travel, documentation, and administrative needs. They will work closely with the evaluation team leader to determine the evaluation's administrative requirements. They will also work closely and be supervised by CLAIMDev's administrative unit when conducting procurement and making other logistical arrangements.

EXTERNAL EVALUATION TEAM QUALIFICATIONS

The ideal candidates for the external evaluation team should possess the combination of skills and qualifications described below:

EVALUATION TEAM LEADER

- Evaluation professional with at least 10 years of experience conducting research or evaluation studies, having served as a team leader or in an equivalent position on USAID evaluations or large research projects.
- In-depth knowledge and understanding of evaluation, survey design and methodology, and/or social cohesion, socio-economic interventions, humanitarian assistance in highly complex situations (especially in the context of Mindanao cultures), and political conflict dynamics.
- A master's degree in the social sciences or related disciplines is required. A Ph.D. is preferred.
- Ability to write message-driven evaluation reports in English.
- Proven ability to lead and manage project evaluation teams.
- Willingness and ability to work as part of a team.
- Excellent English communication skills, both written and oral. Evaluation reports drafted by candidates may be requested.
- Fluency in Tagalog and local dialects spoken in Mindanao is a plus.

EVALUATION TECHNICAL SPECIALISTS (2)

- Expertise in social cohesion, socio-economic interventions, humanitarian assistance in highly complex situations (especially in the context of Mindanao cultures), and political conflict dynamics, and/or in-depth knowledge and understanding of evaluation, survey design and methodology. One of the technical specialists should have a strong background in gender and inclusive development.
- Willingness and ability to work as part of a team.
- Demonstrated knowledge of monitoring and evaluation systems.
- Evaluation experience is strongly preferred.
- At least seven years of experience in a relevant discipline is preferred.
- A master's degree in social sciences or a related discipline is required. A Ph.D. or doctoral studies is preferred.
- Excellent English communication skills, both written and oral. Sample studies or published work may be requested from candidates.
- Fluency in Tagalog and local dialects spoken in Mindanao is a plus.

QUALITATIVE AND QUANTITATIVE DATA ANALYSTS

- Expertise in analyzing qualitative and/or quantitative data.
- Willingness and ability to work as part of a team.
- Demonstrated knowledge and experience in organizing and cleaning qualitative or quantitative datasets, and in analyzing qualitative data using MAXDQA or SPSS to analyze quantitative data.
- Demonstrated knowledge and experience in organizing and displaying data in graphs and tables, including creating data visualizations and infographics.
- At least five years of experience in data analysis.
- A bachelor's degree in social sciences or a related discipline is required. A master's degree or studies is preferred.

- Excellent English communication skills, both written and oral. Sample studies or published work may be requested from candidates.
- Fluency in Tagalog and local dialects spoken in Mindanao is a plus.

FIELD REGIONAL RESEARCH ASSISTANTS

- At least five years of experience in monitoring and evaluation, social cohesion, socio-economic interventions, humanitarian assistance in highly complex situations (especially in the context of Mindanao cultures), or political conflict dynamics.
- A master's degree in the social sciences or a related discipline is required.
- Willingness and ability to work as part of a team.
- Excellent English communication skills, both written and oral. Sample studies or published work may be requested from candidates.
- Fluency in Tagalog and local dialects spoken in Mindanao is required.

PROJECT ASSISTANT

- Experience providing support services, preferably for evaluations, including: formatting interview guides and survey questionnaires; using remote data collection tools; supporting document management and data processing; and scheduling and arranging consultation meetings, travel, and venues for learning events.
- A bachelor's degree in the social sciences or a related discipline is required.
- Excellent English communication skills, both written and oral.
- Fluency in Tagalog and local dialects spoken in Mindanao is a plus.

CLAIMDEV EVALUATION TEAM

CLAIMDev will have the ultimate responsibility for the integrity, quality, and management of the external evaluation team.

CHIEF OF PARTY (1 CLAIMDEV)

The CLAIMDev chief of party will have the primary responsibility for quality control. She will supervise and manage the work of the principal investigator and team leader.

PRINCIPAL INVESTIGATOR (1 CLAIMDEV)

The principal investigator will be the CLAIMDev senior monitoring, evaluation and learning specialist. He will have primary responsibility for all aspects of the evaluation, including design, implementation, and reporting. He will also be responsible for managing, monitoring, and ensuring the integrity of all collaborative relationships with USAID and its partners, stakeholders, and beneficiaries. He will additionally supervise the work of all evaluation STTA consultants as well as the CLAIMDev evaluation specialist.

EVALUATION SPECIALIST (1 CLAIMDEV)

The evaluation specialist will assist the principal investigator/CLAIMDev senior monitoring, evaluation and learning specialist as part of continuity measures and integrating CLA approaches into the CLAIMDev work processes. The evaluation specialist will also assist the principal investigator in ensuring effective coordination between the evaluation team and the contracted communications groups during development of learning materials and implementation of learning events.

MEETINGS AND EVENT COORDINATOR (1 CLAIMDEV)

The meetings and event coordinator will provide logistics, meeting, and event coordination support to the external evaluation team.

EVALUATION SCHEDULE

The evaluation will be conducted during an eight-month period, estimated to run from August 2021 through March 2022. Divided into three phases, the list of evaluation activities and their estimated duration are shown in Table 6.

TABLE 6. ESTIMATED DURATION AND SCHEDULE		
TASK NUMBER	TASK NAME	ESTIMATED DURATION (BUSINESS DAYS)
Phase 1 – Evaluation design (August - September 2021)		
1	Hold evaluation team planning meeting	3
2	Conduct document review	10
3	Hold initial consultations with IPs and major stakeholders	5
4	Prepare inception report that includes evaluation design, methodology, tools, and schedule	10
5	Submit draft inception report and receive USAID comments	5
6	Revise inception report	8
7	Submit revised inception report to USAID/Philippines	0
8	Hold inception briefing	2
Phase 2 – Evaluation field research (September - December 2021)		
9	Pilot and finalize tools, and plan field logistics	10
10	Train end-line field enumerators	3
11	Coordinate field visits and make other logistical preparations	5
12	Conduct document review and analysis	10
13	Collect data	30
14	Process and analyze data	20

TABLE 6. ESTIMATED DURATION AND SCHEDULE

TASK NUMBER	TASK NAME	ESTIMATED DURATION (BUSINESS DAYS)
15	Hold USAID out-briefing	2
Phase 3 – Draft and finalize evaluation report and conduct learning events (January – March 2022)		
16	Draft final report	30
17	Submit final report draft to USAID/Philippines for comment	0
18	Revise final report draft based on USAID comments	5
19	Conduct first learning event: present findings, conclusions, and recommendations to USAID, IPs and major stakeholders	5
20	Revise final report based on learning event feedback	5
21	Submit final report to USAID/Philippines	0
22	Conduct second learning event: share findings and lessons learned with a wider audience of stakeholders, beneficiaries, and the interested public	5
23	Obtain final report approval from USAID/Philippines	0
24	Submit final report to the DEC and upload data to the DDL	0

FINAL REPORT

FORMAT

The final report will be a message-oriented document that will cover the nine sequential elements in USAID’s evaluation report template:

1. Abstract
2. Executive summary
3. Evaluation purpose
4. Background on the context and the strategies/projects/activities being evaluated
5. Evaluation questions
6. Methodology
7. Limitations to the evaluation
8. Findings, conclusions, and (if applicable) recommendations
9. Annexes

The report should not exceed 40 pages, inclusive of a three-to-five-page executive summary. The evaluation methodology shall be explained in detail. Limitations to the evaluation will be disclosed, with particular attention to limitations associated with the evaluation methodology (e.g., selection bias and recall bias).

The annexes to the report shall include the following:

- Evaluation SOW
- Evaluation design and work plan
- Statements of difference (if any) regarding significant unresolved differences of opinion by funders, implementers, and/or members of the evaluation team
- All tools used in conducting the evaluation such as questionnaires, checklists, and discussion guides
- Sources of information (properly identified and listed)
- Disclosure of conflict-of-interest forms for all evaluation team members, either attesting to no conflicts of interest or describing existing conflicts of interest

The principal investigator will ensure that the final evaluation report is publicly available through the USAID Development Experience Clearinghouse (DEC) within 90 calendar days of the official completion date listed in the evaluation contract. The approved evaluation report shall be uploaded to the DEC by the evaluators. Per ADS 579, all collated data shall be stored in electronically readable form and submitted to the Development Data Library (DDL).

QUALITY ASSURANCE CRITERIA

Per USAID ADS 201.3.5.17, draft evaluation reports must undergo a peer review organized by the office managing the evaluation. The following criteria will serve as the basis against which the report is reviewed:

- The evaluation report as a whole should represent a thoughtful, well-researched, and well-organized effort to objectively evaluate the strategy, project, or activity.
- The evaluation report as a whole should be readily-understood and should identify key points clearly, distinctly, and succinctly.
- The executive summary should present a concise and accurate statement of the most critical elements of the report.
- The evaluation report as a whole should adequately address all evaluation questions included in the SOW, or a revised version of the questions that resulted from documented consultation and agreement with USAID.
- The evaluation methodology should be explained in detail and sources of information properly identified.
- Limitations to the evaluation should be adequately disclosed in the report, with particular attention to limitations associated with the evaluation methodology (i.e., selection bias, recall bias, and unobservable differences between comparator groups).
- Evaluation findings should be presented as analyzed facts, evidence, and data. They should not be based on anecdotes or hearsay, or should not simply be the compilation of people's opinions.
- Findings and conclusions should be specific, concise, and supported by strong quantitative or qualitative evidence.

- If evaluation findings assess person-level outcomes or impact, they should also be separately assessed for both males and females.
- If recommendations are included, they should be supported by a specific set of findings, and should be action-oriented, practical, and specific.

OTHER REQUIREMENTS

All quantitative data collected by the evaluation team must be provided via an electronic file in an easily-readable format, as agreed upon with the contracting officer's representative (COR). The data should be organized and fully-documented for utilization by those who are not completely familiar with the activity or the evaluation. USAID will retain ownership of all datasets.

USAID contractors must submit any dataset created or collected with USAID funding to the DDL in accordance with the terms and conditions of their awards. This is in keeping with Executive Order 13642 and the OMB Open Data Policy (M-13-13), which states that an agency's "public data listing may also include, to the extent permitted by law and existing terms and conditions, datasets that were produced through agency-funded grants, contracts, and cooperative agreements."