

Scope of Work
Cooperative Development Program 4 (CD4)
Charge code: CDP 170

Date: 1/8/2024
Assignment Title: CD4 Final Evaluation for Lebanon
Assignment Dates: 2/15/2024 - 7/30/2024
Assignment Manager: Nour Serhan

Scope of Work

I. Project Overview

The Cooperative Development-4 (CD4) program aims to improve cooperatives in Lebanon to better meet the growing needs of their members. The CD4 program is funded by the United States Agency for International Development (USAID) and implemented by Venture37. Venture37 has designed the CD4 project to address system constraints and grow burgeoning opportunity areas, while leveraging the progress we and other private and public change agents have already made in Lebanon to drive continued cooperative development. Through CD4, Venture37 applies institutional learning and tools to advance cooperatives, so they are better able to meet the evolving needs of their members. The goal of CD4 is to advance cooperatives in Lebanon by 1) improving the cooperative enabling environment through capacity building; and 2) improving cooperative business performance by providing technical assistance (TA) to primary cooperatives directly and through implementing partners. Supporting both of these results, CD4 is working to 3) improve development community support for cooperatives by conducting research on locally-defined learning agenda questions and disseminating learning through local and global channels to improve implementation of CD4 and other cooperative development programs. All CD4 activities have a focus on engaging women and youth in the cooperative development process.

II. Goal / Objectives

From February 2024 through July 2024, an external consultant will be hired to conduct a qualitative final evaluation for the Cooperative Development Activity 4 (CD4) implemented in Lebanon. The main aim of this evaluation is to assess and document the extent to which the goals and the objectives established in the Results Framework have been achieved, as well as to provide a critical analysis for any variances or deviations that may have occurred. Evaluation expectations and priority are to present findings and conclusions that address the specific assessment questions and criteria set out below. Lessons learned and recommendations must also be provided to Venture37, USAID, activity participants, activity partners and other stakeholders including the government of Lebanon and USAID/Washington for the improvement of similar future activities. Evaluation will seek to answer the following critical questions and criteria:

- 1- To what extent has the activity contributed to strengthen the enabling environment for cooperatives in Lebanon?

- a. What was the level of collaboration and support from the government, public, private, and developmental organizations?
- 2- To what extent has the project contributed to raise awareness on cooperatives as a model of sustainable economic business?
- 3- To what extent are project-supported primary cooperatives better able to meet the evolving needs of their members? To what extent did CD4 respond to cooperative members' priority needs?
- 4- To what extent has the business performance of project-supported primary cooperatives improved?
 - a. Which specific activities (i.e., technical assistance, in-kind grants, market linkages) have led to the greater impact on the business performance and growth of cooperatives?
- 5- What lessons from the best-performing cooperatives can be applied to the poorest-performing cooperatives? What learnings can be transferable to the broader cooperative sector?
- 6- To what extent has the project been effective in increasing cooperatives' memberships?
- 7- To what extent has the project been effective in increasing youth participation in the cooperative sector?
- 8- What was the overall degree of CD4 flexibility and adaptability to facilitate rapid response to possible unforeseen external factors or changes of context (i.e., economic crisis, security threats)?
- 9- To what extent are CD4 outcomes likely to be sustained after activity implementation or the termination of donor assistance?
- 10- Are the barriers hindering the business performance and growth in scale and membership of cooperatives still the same as those identified at the onset of the project?
- 11- To what extent has project-supported learning and dissemination impacted cooperatives and the cooperative development community's support of cooperatives?

The evaluator will perform the relevant analyzes following the review of all useful secondary data generated by CD4 and other implementing partners involved during the project. Existing monitoring data collected by project staff includes but is not limited to baseline evaluation, annual and semi-annual reports, PM2 and financial data tables, partners reports, and scorecard report. The evaluator will also collect qualitative primary data using pre-approved developed tools to address the assessment questions set out above. Primary data will be collected from all 12 project participating cooperatives, as well as from relevant stakeholders and key actors (i.e., General Directorate of Cooperatives, CD4 staff, implementing partners, coaches, etc.).

III. Key Activities

The evaluation will consist of the following phases:

REVIEW AND ANALYZE DOCUMENTS FROM THE FOLLOWING SOURCES:

- a. Internal CD4 Lebanon documentation including, but not limited to 1. Theory of Change, 2. Baseline Evaluation and tools, 3. Annual and semi-annual reports and data tables, 4. Project agreement with USAID, 5. Agreements signed with partners and partners' progress reports, 6. CD4 Monitoring and Evaluation and Learning Plan (MELP), 7. Annual work plans, 8. Scorecard Report, 9. Annual monitoring data including Social Capital and Perceived Value data, registration, financial and PM2 data, and events and coaching data
- b. Relevant literature from outside sources, including some shared by the CD4 team and others which the consultant will find on their own (i.e., reports from government, NGO or international organization project reports, relevant academic articles, etc.)

DEVELOP/REFINE METHODOLOGY AND DATA COLLECTION TOOLS

In close collaboration with Venture37 and based on the background reading, the consultant is expected to:

- Prepare the workplan for qualitative data collection, data analysis and report writing. This should include the selection of Key Informants and Focus group and Scorecard workshop participants.
- Develop/revise data collection tools for qualitative data collection. Questionnaires, facilitations guides, and Scorecards should be similar to baseline to ensure comparability of data over time, but additional questions should be added to achieve the evaluation objectives and answer the evaluation questions listed above. Venture37 will translate the tools if necessary.
- Develop and submit an inception report that includes all of the above for review and approval by Venture37.

CONDUCT FIELD DATA COLLECTION

- Organize logistical plans and budget for KIIs, FGDs, and Scorecard workshop including schedule and materials in compliance with agreed methodology and time frame.
- Carry out the fieldwork applying appropriate quality control and research ethics. Note that data collection is not expected to occur on weekends and national holidays (i.e., Easter, Eid, etc.). The consultant will collect data as per the below estimates of FGDs, KIIs and Scorecard workshop:

	Total number	Sources
KIIs	10 to 15 interviews	Key stakeholder groups (cooperatives, partners, GDC, etc.)
FGDs	5-7 meetings	Participating cooperatives
Scorecard workshop	1	10-15 participants (ideally same attendees than baseline workshop)

CONDUCT DATA ANALYSIS AND REPORTING

- Analyze, synthesize, and interpret primary and secondary data using appropriate software. Although most of the data collection work conducted by the consultant will be qualitative, the consultant is also expected to conduct quantitative analysis of data collected by Venture37 staff to triangulate the results and present the main findings.
- Develop a report outline for review and approval by Venture37.
- Prepare a draft final evaluation report, addressing the objectives and questions of the evaluation outlined above. The consultant should provide Venture37 the opportunity to reflect on the evaluation at least one week prior to handing over the final document.
- Develop a PowerPoint presentation of evaluation findings, present and submit to Venture37 and stakeholders.
- Prepare a final evaluation report that complies with the section 5 of the present document and incorporates revisions based on Venture37 feedback on the draft report.
- Prepare and submit data sets and transcripts/notes with relevant documentation to Venture37.

IV. Detailed Tasks/Deliverables and Timeframe

General Timeframe: from March-June 2024. The anticipated timeline is provided below. Deviations from this timeline are acceptable but should be justified within the proposal. Note that adjustment to the timeline will only be accepted if the final deadline remains unchanged and the evaluation is completed by July 2024.

Reporting relationship: The consultant will share all deliverables with the assignment manager for CD4 for review and commentary, and must make any requested changes before they are finalized and approved.

Collaborative relationships: CD4 Lebanon staff (MEL Specialist, Senior Cooperative Development Manager and Cooperative Specialist) will provide some oversight and support, particularly with planning, facilitation, and selection of and communication with stakeholders.

Task	Expectations	Responsibility (Person)	Dates/Due Date
Compile and conduct desk research	<ul style="list-style-type: none"> *Review all materials provided by CD4 staff (internal reports and docs) *Do additional reading of reports, articles, etc. on the coop sector in Lebanon *Write up summary of main useful findings 	STTA, with some literature provided by Venture37 team	February 19- February 29
Inception meeting with Venture37	<ul style="list-style-type: none"> * Discuss evaluation scope, expectations, protocol, methodology, sampling, tools, logistics and timeline 	STTA, Lebanon MEL Specialist, Venture37 GMEL team	March 1
Write Key Informant Interview and identify list of Key Informants to interview	<ul style="list-style-type: none"> *List should have representation of different key stakeholder groups (cooperatives, partners, GDC, etc.) who can share inputs about CD4 and Lebanese cooperative sector * Customize questionnaires per KI *Goal is 10-15 people for interviews 	STTA with review and feedback from Venture37 GMEL team	March 4- March 19
Write Focus Group Discussion facilitation plans + questionnaires + identify FGD participants and plan out schedule and logistics	<ul style="list-style-type: none"> *Should identify key questions/discussion prompts and probing * Customize questionnaires for each group *Include a clear plan for note-taking template *Plan out 5-7 meetings with 5-10 attendees each *Plan final schedule, venue, logistics and, budget *Plan should include identification of risks/contingencies and back-up plans 	STTA with review and feedback from Venture37 GMEL team	March 4 - March 19
Submission of Inception report and KIIs and FGDs tools to Venture37	<ul style="list-style-type: none"> *Should include final detailed work plans with schedules, budget, broken down tasks and responsibilities for each activity, questionnaires for each activity *3-5 pages + tools 	STTA	March 20
Finalization and approval of Inception report and tools	<ul style="list-style-type: none"> *Venture37 to review and provide feedback on Inception report and tools *STTA to finalize and include, if necessary, feedback and corrections suggested by Venture37 	STTA, Venture37	March 20-March 27
Execute Key Informant Interviews	<ul style="list-style-type: none"> *Run all the KIIs as planned in the Inception report, using the approved questionnaires * Ideally should be conducted in person but, if necessary, can be done virtually *Questionnaires will be written in English, but interviews should be done in Arabic if the KI is a native Arabic speaker 	STTA with MEL Specialist support	March 28 -May 10
Execute Focus Group Discussions	<ul style="list-style-type: none"> *Run all FGDs as planned in the Inception report using approved questionnaires/facilitators guide 	STTA with MEL Specialist support	March 28 -May 10
Plan out venue, schedule, logistics	<ul style="list-style-type: none"> *Schedule of the sessions should be written with clear start and end time, breaks, buffer time in case of issues 	STTA with CD4 Lebanon team support	April 26

for Scorecard workshop	*Venue should be in Beirut and plans need to be made for materials, refreshments, transport/per diem allowances for participants if deemed necessary, but these will be covered by Venture37		
Invite participants to Scorecard workshop	*Attendees to baseline Scorecard workshop should ideally participate again, but additional ones can also be invited if deemed relevant *Invitations must be sent 2 weeks in advance, then follow-up done to confirm attendance *CD4 Lebanon team needs to send invitations for relationship-building and continuity	CD4 Senior Program Manager	April 29-May 3
Prepare Scorecard Templates and Facilitation plan for workshop	*Prepare a Scorecard template based on the sub-elements and scoring of the baseline Scorecard workshop *Plan out facilitation guide including introduction/purpose of the activity, description of the scorecard template elements and definitions, plan for group discussions to score each element	STTA	April 22-April 26
Execute Scorecard workshop	*Run the scorecard workshop based on the planned facilitator guide and using the created scorecard template *Ensure notes are taken on full discussion, not just the final consensus, but then also make very clear note of the final scores and evidence that the group agrees to	STTA and CD4 Lebanon team support for notetaking	May 17
Analyze results from all qualitative discussions	*Systematically analyze and triangulate the results by questions/theme and see the common answers that come up, or where there is disagreement be able to highlight roughly how many people agreed with each perspective, and what groups they represented *Ideally very detailed notes will be taken and typed up from all of the different qualitative interviews/discussions, and a qualitative data analysis software will be used to pull out common themes, do some quantification/frequency analysis of certain ideas	STTA	May 13-May 27
Draft and submission of evaluation report outline		STTA	May 27-May 29
Venture37 reviews report outline and provides STTA with comments and suggestions for revisions		Venture37	May 30-June 4
Draft and submission of Full Evaluation Report with Executive Summary and all sections listed in	*Present findings and conclusions gathered to the critical questions list, showing the main common ideas, and highlighting where there was variance in the replies and why *Highlight lessons learned and key recommended activity changes/improvements	STTA	June 5-June 21

Deliverables in the below section	*Report should be 10-15 pages report body + separate annexes (completed scorecards, data collection tools, etc.)		
Finalization of Full Evaluation Report and Executive Summary based on Venture37 feedback	*Venture37 to review and provide feedback on Full Evaluation Report and Executive Summary *STTA to finalize and include, if necessary, feedback and corrections suggested by Venture37	STTA and Venture37	June 24-July 5
Create qualitative endline top findings presentation	*Make a PPT with an executive summary of the main ideas from the Full Evaluation Report, with a focus on lessons learned and recommendations for CD4 *Include time for clarification questions and discussion questions *Plan for a 2 hours presentation	STTA	July 8-July 11
Present endline findings to the CD4 team	*Present the findings to the CD4 team in person, with COP and GMEL Manager and other international staff participating virtually; lead discussions and field questions from the team	STTA	July16

V. Deliverables

Deliverable	Description	Date Due
Inception Report and Tools	*3-5 pages Document review summary, showing clear findings *Inception report including final schedule, sampling plan, time frame (3-5 pages), with appended tools shown below, all reviewed and approved by GMEL Manager. Should have evidence that document review learnings were incorporated into making the final plan and tools <ul style="list-style-type: none"> a. Key Informant Interview scripts, personalized by KII b. Focus Group Discussion questions and facilitation guides, personalized by type of group c. 2 Scorecard templates with completed elements and definitions, based on first Scorecard workshop d. Scorecard workshop schedule and facilitation guide 	March 27
Draft Final Report Outline	Draft of Final Report Outline	June 4
Final Evaluation Report	*10-15 pages Word document summarizing main findings of the qualitative research. Must address the critical questions with evidence-driven conclusions and entail evidence of systematic pattern/trend/comparison analysis from the various raw data sources. Report should include the following sections: <ul style="list-style-type: none"> a. Acknowledgements b. List of Acronyms and abbreviations c. Table of Contents d. Executive summary (max 1 page) e. Background (Activity description and purpose of endline) f. Methodology used in the evaluation and limitations of the study g. Overall Results and Findings by evaluation question h. Lessons learned i. Programmatic recommendations if any j. Annex: Summary Document that gives an overview of key results, lessons learned and recommendations with infographics (maximum: 3-5 pages) 	July 5

Deliverable	Description	Date Due
	<ul style="list-style-type: none"> k. Annex: Table of key activity indicators with updated values in comparison to baseline l. Annex: Comparison of scorecards from baseline to endline m. Annex: Results Framework n. Annex: Scope of Work for the evaluation o. Annex: evaluation tools p. qualitative transcripts, field and interview notes, complete list of key informant interviews and FGDs in Microsoft Word document 	
PowerPoint Presentation	Powerpoint summarizing the key findings, lessons learned and recommendations from the report that can be presented to relevant internal and external stakeholders for both countries.	July 16

PAYMENT SCHEDULE

Venture37 will pay for services accepted as complying with service contract requirements in four installments as follows:

Installment	% of Total	Deliverables	Timeline
First	30%	<ul style="list-style-type: none"> ▪ Contract Signature 	Contract signature
Second	20%	<ul style="list-style-type: none"> ▪ Desk Review conducted, ▪ Inception meeting held ▪ Inception report submitted with all of the data collection tools as attachments and approved 	Submission and approval of inception report and tools
Third	20%	<ul style="list-style-type: none"> ▪ Qualitative data collection completed ▪ Report Outline submitted and approved ▪ Data analysis completed 	Submission and approval of report outline
Fourth	30%	<ul style="list-style-type: none"> ▪ Finalized Final Evaluation report submitted along with remainder of deliverables 	Approval of full final version of the Final Evaluation report

RELATIONSHIPS AND RESPONSIBILITIES

The consultant chosen to conduct this evaluation will be financially and legally independent of Venture37 and its partners to ensure evaluation validity.

The evaluator will perform the tasks described in this SOW with support from CD4 staff members, assigned by the Program Director, to provide relevant documents and information and to locate participants and stakeholders. The evaluation team will communicate with the CD4 Monitoring & Evaluation Specialist and the headquarters MEL Manager, and keep them informed of their progress. Venture37 staff will provide feedback on the inception report, data collection tools and draft report. During the evaluation, the evaluator may ask for additional advice or guidance from the above-mentioned Venture37 staff, but the evaluator should conduct the evaluation with independence and impartiality.

The evaluator will communicate with the Venture37 Program Director, Kari Onyancha; Lebanon MEL Specialist, Nour Serhan; and the US-based Global Monitoring Evaluation and Learning (GMEL) support, Sadie Paschke. Nour Serhan will give the final approval on all evaluation deliverables and will work closely with the CD4 MEL team to ensure the deliverables are reviewed and shared among relevant staff and stakeholders.

The assignment will require travel to targeted activity regions, provided security restrictions allow it. Venues, transportation for field work outside Beirut, and copying of tools will be covered by Venture37, as well as interpreters if needed. Any transportation within Beirut, food, lodging, flights and incidental costs, will be covered by the consultant.

QUALIFICATIONS FOR CONSULTANT

Required

- Minimum Bachelor's Degree in economics, statistics, or a related field
- 5+ years of experience in qualitative research design and implementation in the development sector in Lebanon, ideally as part of a MEL work for an international project
- Strong experience and skills facilitating group workshops and discussions.
- Strong experience and skills in conducting research and data analysis, particularly systematic analysis of qualitative data.
- Specific experience in conducting some or all the following- literature reviews, key informant interviews, focus group discussions, stakeholder workshops.
- Strong experience and skills in writing reports in English
- Fluency in both written and spoken English and Arabic
- Computer literacy and competency in use of Microsoft Office software.
- Highly developed conceptual, analytical, and innovative problem-solving ability.
- Ability to establish priorities and to plan, coordinate and monitor tasks.
- Ability to independently and proactively work as a team member with minimum day-to-day oversight.

Desired

- Master's degree in economics, statistics or a related field
- 3+ years of experience specifically doing Endline evaluation work for international development projects.
- Additional Monitoring & Evaluation experience, beyond just qualitative research work (5+ years)
- Experience working on evaluations of USAID-funded projects.
- Experience conducting qualitative analysis using Nvivo, Dedoose or similar software.
- Experience working with stakeholders from government.
- Experience working with cooperatives, especially agricultural cooperatives.

HOW TO APPLY

- Applicants should submit documents to venture37.lebanon@landolakes.com by no later than **8 February 2024** (11:59 pm Beirut time), although applications will be reviewed on a rolling basis.
- Please indicate "CD4 Final Evaluation" in the subject line.
- CV/Resume
- A Cover letter/proposal (2 pages max) that outlines:
 - How you fit the requirements for the position
 - Why you would be successful in this consultancy.
 - A financial proposal outlining all-inclusive fee required to undertake this assignment.
 - 2-3 references (should be former supervisors; include name, email address, phone number, their title, duration, and nature of your work relationship)

Applications will be evaluated on the following criteria:

- 70% Strength of consultant experience
- 30% Cost competitiveness and value