



ANNEX II: TERMS OF REFERENCE

Building a framework for impact assessment for the UfM - 13 - PRO567CAB-2024

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1. BACKGROUND INFORMATION

1.1. Partner country

N/A

1.2. Contracting authority

Secretariat of the Union for the Mediterranean (UfM).

1.3. Context

As the UfM celebrated its 15th anniversary in 2023, a reform process was launched by its Co-Presidency and member states, in which a closer look at the role, capacity and efficiency of the organisation have been taken. In parallel to various internal structural measures, the organisation has been assessing its capacity to deliver impact on the ground.

Indeed, one of the main features of the intergovernmental organisation since its creation is its action-driven methodology, aimed at translating policies into concrete and tangible results for the citizens of the Euro-Mediterranean region. In this context and in the framework of the UfM- Swedish International Development Agency (SIDA) programme (2022-2025), the UfM Secretariat has developed a Results-Based Management approach (RBM) that needs today enlargement and improvement beyond the Sida-funded programme.

On the occasion of the current reflection about the future of the UfM, questions related to its capacity to assess and evaluate its impact are central. Based on that, this consultancy's objectives are to support the UfM in identifying and developing the scope, tools and methodology for conducting its impact assessment, as well as to train its staff for the use of this new framework.

2. OBJECTIVES & EXPECTED OUTPUTS

2.1. Overall objective

The overall objective of this action is to develop a framework for assessing the impact of the Union for the Mediterranean, by identifying the relevant impact assessment criteria and the key performance indicators, by establishing a comprehensive implementation methodology, including a data collection system, and by training its staff to use this new framework.

2.2. Specific objective(s)

The specific objectives of this contract are as follows:

- Develop a stakeholder mapping for the UfM
- Identify UfM scope of control, influence and interest
- Identify relevant impact assessment criteria for the UfM
- Identify relevant key performance indicators (KPIs) for the UfM
- Design a methodology detailing how to collect, treat and analyse KPIs data and measure impact
- Develop guidelines to inform and instruct UfM staff about impact assessment objectives, the methodology used and the specific role for each position
- Train UfM staff on the developed methodology, supporting a better transversal and common understanding of the UfM impact and an improved results-based management based on a Monitoring, Evaluation and Learning mindset



- Enhance the visibility of the UfM by defining clear impact parameters allowing to better explain to external audiences the impact of the UfM and disseminate its results

2.3. Expected outputs to be achieved by the contractor

The expected outputs of this contract are as follows:

- DEFINE: A **definition of impact** for the UfM considering its multiple working levels (policy, platforms, projects) and defining the most relevant evaluation criteria for measuring UfM impact based on OECD/DAC's Quality Standards for Development Evaluation
- DESIGN: A **list of quantitative and qualitative, internal and external key performance indicators** to assess UfM impact based on the identified evaluation criteria
- DEVELOP: A **methodology** detailing how to collect, treat and analyse KPIs data and measure UfM impact, and a benchmarking of digital **tools** to implement the methodology
- TRAIN: **UfM staff and key stakeholders** on the new impact assessment framework, tools, and methodologies.

3. ASSUMPTIONS & RISKS

3.1. Assumptions

- Stakeholder cooperation is ensured, with all UfM stakeholders, including member states, staff, and external partners, providing timely and accurate information required for stakeholder mapping and impact assessment.
- Relevant data and lessons learned from the RBM framework under the UfM-Sida program are accessible and sufficient to inform the development of the new impact assessment framework.
- UfM staff and stakeholders are available, motivated, and open to adopting new methodologies and tools through training sessions.
- Effective communication channels exist to allow seamless engagement with UfM staff, stakeholders, and member states.
- The UfM infrastructure supports the adoption and use of the digital tools identified for implementing the methodology.
- The OECD/DAC quality standards for development evaluation align with UfM's objectives and operational realities.

3.2. Risks

- Resistance from stakeholders to change or to engage in the proposed impact assessment processes and methodologies.
- Insufficient, outdated, or inaccurate data may hinder the development of meaningful KPIs and an effective impact assessment framework.
- Delays in the adoption of digital tools due to technical, financial, or logistical barriers could impede timely implementation.



4. SCOPE OF THE WORK

4.1. Tasks

○ Task 1: Define Impact Parameters

- Conduct a review of UfM's activities over the past 15 years, including to define the relevant criteria for evaluation of impact for the UfM. The review shall identify and analyse the types and extent of impact on stakeholders and the broader Euro-Mediterranean region.
- Identify the impact definitions from OECD, UNDP and other similar organizations to identify the best definition of impact for the UfM.
- Identify strengths and weaknesses in current impact assessment practices and recommend improvements and lessons learnt.

○ Task 2: Design performance indicators

- As a priority, by mid-May 2025, formulate external indicators to measure impact on knowledge dissemination, behavioural changes, and policy outcomes.
- Develop a preliminary list of quantitative and qualitative internal performance indicators to assess effectiveness, agility, and operational efficiency within UfM.

○ Task 3: Develop a methodology for implementation

- Analyse the existing UfM-SIDA programme RBM matrix (2022-2025) and assess the most efficient way to integrate it into the impact definition framework.
- Define roles, responsibilities, and methodologies for data collection, analysis, and reporting within UfM.
Evaluate the relevance and applicability of the following RBM approaches (but not limited to) to the UfM: Logical Framework Approach, Outcome Mapping, Outcome-harvesting and propose efficient methods for using these methods with minimal resources-.

○ Task 4: identify and develop user-friendly tools to use the Methodology for Implementation:

- Deliver a benchmarking of user-friendly software available in the market that fit UfM needs in terms of efficiency, cost and sustainability taking into account UfM internal capacities.
- The benchmarking should include:
 - (i) a generic benchmarking, including a comparison of best practices in integrating MEL software in organisations similar to the UfM and
 - (ii) a product benchmarking study detailing the initial cost and annual cost of the software, as well as maintenance costs if any, the modalities of use, including quick guidelines with graphic demonstration of the interfaces of the different tool identified and an example of use for the UfM.
- Propose methodological and digital tools that include features for data collection, management, analysis, and reporting specifically tailored for impact assessment.



- Ensure compatibility and sustainability of these tools with existing IT infrastructure, including financial system, and other IT systems used within the UfM.
 - Allow for intuitive interface and ease of use to facilitate adoption by staff members, while enhancing strong data security measures to protect sensitive information.
 - Provide technical support and propose solutions for future necessary updates.
- **Task 5 (subject to confirmation): Train UfM staff and key stakeholders on the new framework, tools, and methodologies**
- Develop guidelines to inform and instruct UfM staff about impact assessment objectives, methodology and the specific role for each position.
 - Develop user-friendly guidelines to support the use of the tools developed/integrated in the digital system.
 - Propose training modules on the impact assessment framework developed, tools, and methodologies, tailored to the specific needs and skill levels of staff members (management; project management; HR; IT...).
 - Provide training materials, manuals, and documentation for ongoing reference, including registered training session for future staff that joins the UfM after the framework set-up.
 - Incorporate interactive learning methods to enhance engagement and understanding.

4.2. Deliverables' Timeline

Main deliverables	Proposed timeline to deliver
Task 1: Define impact parameters	March-April 2025
Task 2: Design performance indicators	April-May 2025
<i>Validation of the proposed framework (definition and accompanying KPIs)</i>	<i>UfM Senior Officials Meeting - June 2025</i>
Task 3: Develop a methodology for implementation	September-October 2025
Task 4: identify and develop user-friendly tools to use the Methodology for Implementation	September-October 2025
Task 5 (subject to confirmation): Train UfM staff and key stakeholders on the new framework, tools, and methodologies	January 2026

4.3. Project management

4.3.1. Responsible body

The project will be managed by the Cabinet of the Secretary General of the UfM.

All issues related to the technical elements in relation to this contract, mainly the specific activities as outlined in section 4 of these Terms of Reference, shall be taken by the project manager nominated by the contracting authority pursuant to special conditions of contract Article 2.1. The project manager will ensure these tasks in accordance with UfM internal rules and procedures.



5. LOGISTICS AND TIMING

5.1. Location

The place of work will be the Contractor's usual workplace.

The kick-off and final meetings will be organised through videoconference by the contracting authority.

5.2. Start date & period of implementation of tasks

The intended start date is in March 2025. The period of implementation of the contract will be 12 months from this date (end date 31 March 2026, subject to confirmation of Task 5, otherwise the end date will be 31 December 2025). Please see Articles 19.1 and 19.2 of the special conditions for the actual start date and period of implementation.

6. REQUIREMENTS

Tenders deviating from the requirements or not covering all minimum requirements described below may be rejected on the basis of non-compliance with the tender specifications and will not be further evaluated.

6.1. Staff

Note that civil servants and other staff of the public administration, of the partner country or of international/regional organisations based in the country, shall only be approved to work as experts if well justified. The justification should be submitted with the tender and shall include information on the added value the expert will bring as well as proof that the expert is seconded or on personal leave.

6.1.1. Experts

Experts have a crucial role in implementing the contract. These terms of reference contain the required experts' profiles.

Expert 1 – Key Expert

Responsibilities

- Develop and maintain project plans, schedules, and budgets.
- Serve as the primary point of contact for stakeholders, providing regular updates and addressing concerns.
- Conduct in-depth analysis of the relevant criteria for evaluating UfM impact and impact definition and the consequent definition of KPI's.
- Develop the methodology, guidelines, training materials and reports and coordinate the delivery of the different outputs
- Train UfM staff and key stakeholders on the new framework and methodologies

Qualifications and skills

Educational Background:

- Master's degree in fields such as Public Policies, Political Science, Public Management, Business Management, Evaluation, or other related disciplines.

**Experience:**

- 10+ years of professional experience in Monitoring, Evaluation, and Learning (MEL), particularly within public sector, international organizations; and/or in public policy evaluation.
- A demonstrated track record of managing large-scale projects or programs involving policy evaluation, ideally with intergovernmental/multilateral organizations or similar entities.
- Demonstrated success as a primary point of contact for stakeholders, providing consistent updates, managing expectations, and addressing inquiries throughout project cycles.
- Track record of building collaborative relationships with stakeholders at multiple levels, ensuring alignment with project goals and milestones.

Specific professional experience:

- Proven experience in project management specifically within the realm of public policy evaluation, impact measurement, or similar strategic initiatives.
- In-depth expertise in conducting MEL (Monitoring, Evaluation, and Learning) frameworks to guide evidence-based decision-making and measure project effectiveness.

Analytical and research skills:

- Advanced quantitative and qualitative research skills for conducting in-depth analyses related to policy impact, outcomes, and measurement techniques.
- Experience in designing impact assessment methodologies and measuring qualitative aspects of organizational or policy impact.

Communication and interpersonal skills:

- Exceptional communication abilities, both written and verbal, to effectively liaise with stakeholders at various levels, deliver progress updates, and manage expectations.
- Strong interpersonal skills to foster collaboration, conduct productive meetings, and coordinate with diverse teams for task completion.
- Proficiency in English; additional knowledge of other UfM languages may be beneficial.

Training and capacity-building skills:

- Ability to design and develop training materials, guidelines, and reports to support knowledge transfer and skill-building among staff and stakeholders.
- Proven skills in training facilitation to deliver effective workshops, presentations, and training sessions on methodology and evaluation practices.
- A demonstrated capacity for cross-cultural communication and collaboration, essential for working in diverse, international team settings like the UfM.

Expert 2 – IT/ToolsResponsibilities

In close collaboration with the key expert, develop user-friendly tools to use the Methodology for Implementation:

- Propose tools that include features for data collection, management, analysis, and reporting specifically tailored for impact assessment.
- Ensure compatibility with existing IT infrastructure and systems used within the UfM.
- Allow for intuitive interface and ease of use to facilitate adoption by staff members, while enhancing strong data security measures to protect sensitive information.



- Provide technical support and propose solutions for future necessary updates, including UfM IT unit.
- Develop user-friendly guidelines to support the use of the tools developed, train staff on their usage.

Qualifications and skills

- Bachelor's or Master's degree in Computer Science, Information Technology, Data Science, Software Engineering, or related fields.
- Additional certifications in data analytics, data management, or software development may be beneficial.
- At least 3–5 years of experience in software or tool development, especially within the data management or impact assessment domain.
- Experience with UI/UX design focused on creating user-friendly and intuitive interfaces.
- Demonstrated prior experience in developing tools for data collection, analysis, and reporting.
- Familiarity with IT infrastructure compatibility and system integration in organizational contexts.
- Proficiency in English; additional knowledge of other UfM languages may be beneficial

Soft skills

- Ability to analyse complex requirements and develop efficient, user-friendly solutions.
- Communication and Collaboration:
- Strong communication skills for training and guiding staff in the use of the tools.
- Ability to work with the IT team and end-users to gather requirements and provide technical support.
- Openness to continuously updating and improving tools to meet evolving user needs and technological advances.
- Precision in ensuring high standards of data security and accuracy within tools.

Additional requirements:

- Technical support: Ability to offer ongoing technical support and respond to user needs for updates or troubleshooting.
- Training capability: Preparedness to train staff in the use of the tools, develop clear user guidelines, and facilitate a smooth onboarding process.
- Security-conscious: Demonstrated understanding of best practices in data privacy and cybersecurity, especially for managing sensitive information.

6.1.2. Non-key experts

Non-key experts are not required.

6.1.3. Support staff & backstopping

The contractor will provide support facilities to their team of experts (back-stopping) during the implementation of the contract.

Backstopping and support staff costs must be included in the price.



7. REPORTS

The work carried out by the contractor under the contract will be the subject of the following technical implementation reports, which shall be sent to the project manager by the contractor both in hard copy and electronic format.

To summarise, in addition to any documents, reports and output specified under the duties and responsibilities of each expert above, the contractor shall provide the following reports:

Name of report	Content	Time of submission
Preliminary report	Inception report compiling a short description of activities to be implemented under Tasks 2, 3, 4, 5 and a timeline reflecting the implementation and results achieved (Gantt Chart). Description of the services delivered under Task 1 including inter alia the identification of the criteria for impact and a definition of impact for the UfM. Describe results achieved.	No later than 5 weeks from the start of implementation.
Interim report 1	Description of the services delivered under Task 2 including inter alia a consolidated definition of impact and a finalized list of quantitative and qualitative indicators for the UfM impact. Describe results achieved.	No later than 10 weeks from the start of implementation.
Interim report 2	Description of the services delivered under Tasks 3 and 4 including inter alia a methodology for implementation and a benchmarking report on methodological and digital tools. Describe results achieved.	No later than 28 weeks from the start of implementation.
Interim report 3	Description of the services delivered under Task 5 (if confirmed) including inter alia training modules, guidelines and other materials. Describe results achieved.	No later than 53 weeks before the end of implementation
Final report	Draft final evaluation report with conclusions, next steps, recommendations and lessons learned. Compile all results achieved.	No later than 4 weeks before the end of implementation

The date and content of the interim report 3 and the final report is subject to the confirmation of Task 5. The reports must be written in English. The Project Manager is responsible for approving the reports.