

## TERMS OF REFERENCE FOR EXPERTS

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**Action code and partner country:** *SOCIEUX+ 2019-25 WEST BANK AND GAZA*

**Action title:** *Strengthening of the monitoring and evaluation system at the Ministry of Social Development (2019-25)*

**Activity number and title:** *Activity 3: Draft the terms of reference of an EU-supported project aiming to the set-up of an M&E system at MoSD*

**Date of implementation of activity:** *1 – 10 June 2020*

**Partner institution:** *Ministry of Social Development (MoSD) of the Palestinian Authority (PA)*

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Partnership led by:



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## **1 BACKGROUND INFORMATION**

### **1.1 Country overview**

The Palestinian National Authority (PNA) is currently located in Ramallah. The entirety of territory claimed by the PNA has been occupied by Israel since the Six-Day War in 1967. Presently, most of the West Bank is administered by Israel though 42% of it is under varying degrees of autonomous rule by the PNA. The term "Palestinian territories" has been used for many years to designate those lands. More recently, the official United Nations terminology has been used, Occupied Palestinian Territory (OPT) increasingly replacing other terms since 1999. The European Union also has adopted this usage.

The lack of peace and reconciliation on the political horizon has created an unsustainable economic situation in the West Bank and Gaza. Even though donor aid had increased government-funded services and fuelled consumption-driven growth from 2007 to 2012, this model of growth has proved unsustainable. The humanitarian context in West Bank and Gaza remains directly tied to the impact of the Israeli occupation. Restricted movement of people, access to resources and basic social services, together with recurrent expropriation of land, settler violence, civil unrest and periodic large-scale armed hostilities have resulted in economic stagnation, high unemployment, poverty and food insecurity.

The OPT's HDI value for 2017 is 0.686— an increase of 4.4% in the last ten years, which put the country in the medium human development category, positioning it at 119 out of 189 countries and territories.

### **1.2 Sector situation**

In 2017, poverty rates trend worsened in Gaza to 53% (33% of deep poverty) compared to 39% in 2011 and improved in the West Bank reaching 14% (6% of deep poverty) compared to 18% in 2011. As a way to fight poverty, the Palestinian Cash Transfer Programme (CTP) provides quarterly cash assistance to some 108,000 poor and vulnerable families in the West Bank and the Gaza Strip, out of almost 117,000 families included in the database (with an additional 10,000 families on the waiting list in Gaza, where the protracted crisis has a drastic impact on poverty rates increase). On average, 66% of the beneficiary families live in the Gaza Strip and 34% in the West Bank.

With regards to internal sector capacities, social protection systems managed by MoSD lack indicators systems that be effective and aligned across all strategic documents, linked to objectives and including baselines and target values. More fundamentally, the definition of the scope of a M&E system, as well as subsequent decision-making, is unfit. The MoSD lacks a specific M&E function or dedicated unit. Despite MoSD collects vast amount of data for the various social sub-systems - e.g. children, women, families, elderly, people with disabilities, etc. - not all collected data is relevant and not all relevant data is being collected. Hence, there is a need to review the database from a relevance point of view. The technical assistance request that MoSD submitted to SOCIEUX+ also acknowledges the weak analytical capacity at the level of regional and general Directorates of MoSD in analysing data and advance solutions to improve policies and programmes.

### **1.3 Role of partner institution in sector**

The Ministry of Social Development (MoSD) of the PNA is responsible for implementing the Social Development Strategy (SDS) for the period 2017-2022, in line with the National Policy Agenda 2017-2022, as well as with the commitments towards the international conventions and the SDGs 2030. The National Policy Agenda puts poverty reduction and service delivery at the core the government's responsibility. As such, MoSD is responsible for the overall sector strategy, including initiatives implemented by other Ministries, such as the Ministry of Health and the Ministry of Education.

The SDS puts forward a comprehensive social development approach ensuring that the right to social protection for the most vulnerable individuals is guaranteed - in particular women, children, elderly, and person with disabilities - applying a rights-based approach. Its vision is to achieve: "a strong, solidary, productive and innovative Palestinian society that provides dignified life for all its members, unleashes their potential and believes in rights, equality, justice, partnership and integration". In that perspective, SDS adopts 4 strategic objectives: 1) Reduce the poverty rate; 2) Remove all forms of social exclusion and marginalization in the Palestinian society; 3) Consolidating complementarity in social development policy, in line with SDGs 2030 and other international standards and conventions; 4) Local development groups lead sustainable development initiatives in the marginalized villages and neighbourhoods.

For the period 2017 – 2019, an Operational Management Plan has been established and MoSD's responsibilities clearly stated. While MoSD steers the Plan's execution, the activities it comprises are actually implemented by the 16 regional offices, 11 of which are located on the West Bank and 5 in the Gaza Strip. The main activities regard granting monetary benefits for poor households, people with disability, children and elderly (mainly through the Cash Transfers Programme), but also to enhance economic empowerment, especially for vulnerable and marginalized sectors of the Palestinian society. Also, a Strategic Results Framework (SRF) has been made available to monitor the sector's progress and to report to the Cabinet Secretariat. The SRF reports, among other things, on the number of families receiving cash transfers or other type of assistance from MoSD, number of individuals in social protection institutions, as well as on the ongoing legislative activity.

## **2 ACTION DESCRIPTION**

As it was observed during the fact-finding mission, few processed data and analyses are available to assess the efficiency of the programs of delivered by MoSD. MoSD has a lot of data coming from a variety of statistical indicators, but a little capacity to analyse them, let alone to make policy adjustments or recommendations. A Monitoring and Evaluation system is therefore little present in MoSD organizational capacity and in view of a sound follow-up of the SDS' implementation.

With the support of development partners, MoSD has been working to improve its internal monitoring and evaluation (M&E) system for over 10 years. Several studies has been done in the last ten years on the subject of M&E; there have also been few interventions aiming to build and strengthen different sub-systems of social development field, including monitoring, reporting, and evaluation. The EU has provided extensive research on this topic, accompanied by GOPA, and recently (2018/19) formulated policy recommendations. Also, a study has been done by OECD's SIGMA, which provides very operational recommendations, which are summarized hereafter:

- Absence of an overall M&E framework. Existing policy-related M&E frameworks have poor indicators, baselines and targets linked to objectives and aligned across all strategic documents. A unit for M&E is absent.
- Weak analytical capacity at the level of regional and general directorates to analyse data and propose solutions/ decisions to improve policy and strategy.
- Poor skills to develop informative reports.
- Need to activate institutional set up/decision making body. There are many parties involved in decision making, hence there is a need to define roles and build capacity.
- No budget execution information in monitoring process.
- Absence or inconsistency of regional data (reports).
- Relevance of data base. MoSD collects vast amount of data for all social sub-systems, e.g. children, women, families, elderly, PwD. However, not all collected data is relevant and not all relevant data is being collected.

The EU Representative Office for the West Bank and Gaza will make available 1.2 million euros funding to provide long-term technical assistance to MoSD for setting up a sound M&E system. The present Action shall therefore help identifying the best ways and areas to orientate the planned EU support on the subject matter.

## **2.1 Overall objective**

To establish an effective monitoring and evaluation (M&E) system for social policies and programs implemented by the Ministry of Social Development (MoSD) of the Palestinian Authority (PA).

## **2.2 Specific objectives**

1. Support MoSD to establish all the necessary requirements needed to build an effective M&E system.
2. Support MoSD to outline a capacity-building strategy in view of managing a M&E system, including at the regional directorate level.
3. Support MoSD to formulate a proposal in view of requesting EU assistance in establishing an effective M&E system.

## **2.3 Expected results**

1. A uniform, shared management strategy is adopted by MoSD.
2. A uniform, shared vision of the components of an effective M&E system - particularly responsibilities, skills and procedures – is adopted by MoSD.
3. A capacity building strategy for sound M&E management is adopted by MoSD.
4. A draft Terms of Reference for the setting-up of a technical assistance project supported by the EU in view of building a M&E system is agreed by MoSD.

## 2.4 Proposed activities

Activity 1: Building a shared management strategy for grounding a M&E system.

- Sub-activity 1.1: Quick assessment of MoSD's current M&E system (tools, flows, data, responsibilities, including M&E-based decision-making)
- Sub-activity 1.2: Align management and staff to a uniform M&E strategy

Activity 2: An approach to strengthen M&E-related capacities and skills, including at the regional directorate level.

**Activity 3: Draft the terms of reference of an EU-supported project aiming to the set-up of a M&E system at MoSD.**

## 3 DESCRIPTION OF ACTIVITY 3

### 3.1 Implementation methodology

The action deploys across three stages, with the final objective of contributing to the definition of the terms of reference of a technical assistance project supported by the European Commission which aims to provide the Ministry of Social Development (MoSD) with a Monitoring & Evaluation (M&E) system and functions applicable to the social policies and programs for which it is responsible. However, in carrying out the action, the experts mobilized by SOCIEUX will focus on aspects that have an intrinsic value for the organizational capacity for the MoSD, such as the definition of a strategic approach to the management based on data analysis, and of a path to strengthen the internal capabilities of the MoSD, including managerial levels and the regional dimension (directorates' staff). Overall, it will be crucial to build on previous studies and recommendations, particularly the OCDE's SIGMA report on building an effective M&E system.

The third activity will put together the analyses and results of the two previous activities, with the aim of preparing the terms of reference of a technical assistance project supported by the European Commission according to its procedures. The experts' team shall be composed, preferentially, of one expert involved into activity 1, and one expert involved in activity 2, in order to capitalize on previous experience and to ensure coherence in the final phase of the technical assistance. The experts' time dedicated to the activity and the preparation of the final deliverable would include a remote working-time ahead of the mission, in view to start drafting the Terms of Reference for the setting-up of a technical assistance project supported by the EU in view of building a M&E system, which will be then discussed, completed and finalized during the on-site mission and the post-mission finalization time allowed to experts.

### 3.2 Tasks

Minimum tasks expected from the experts shall include:

- Ahead of the mission, to get substantial knowledge of the local context; review any relevant background documents provided by the SOCIEUX+ Team and/or the Partner.
- Preliminary contacts with the Partner in view of the preparation of the mission's methodology and agenda, to be transmitted ahead of mission to the SOCIEUX+ team for approval;

- Taking part to the pre-departure briefing with SOCIEUX+ team (around 1 week before the mission);
- During the mission, to conduct consultations with the Partner's executives and staffs, as well as any other external actor that can support the positive deployment of the mission. In particular, experts shall engage in consultations both with the EU Delegation, which will ultimately support the implementation of a project aiming at establishing and running a M&E system at MoSD.
- To present the outcomes of the mission to the partner in order to discuss and take into account comments on the contents of the deliverables before their finalization;
- At the end of the mission, timely submission to SOCIEUX+ of the final deliverables (10 working days after the mission), and availability to go through an eventual round of comments and adjustments in interaction with SOCIEUX+ and the Partner;
- To channel to SOCIEUX+ Communication officer any material that can be useful to inform the public about the activity (pictures, interviews, brief notes or articles).
- To employ the different templates and evaluation forms provided by the SOCIEUX+ Team.

### 3.3 Deliverables

Intermediary deliverables (to be agreed with the Partner and transmitted to SOCIEUX+ at least five working days ahead of the activity)

- A methodological note (max. 3 pages), detailing the working approach, tools and methods to employed, a risks analysis, and outlining the final deliverables to be prepared.
- A detailed agenda (max. 2 pages), detailing the meetings and working sessions to be held, persons to meet.

Final deliverables (to be transmitted to SOCIEUX+ FMT no later than ten days after the activity's completion):

- Action Report (AcR). To be filled according to template.
- Final deliverable D5 (annex 1 to Action Report). The Terms of Reference for the setting-up of a technical assistance project supported by the EU in view of building a M&E system
- Experts' Mission Report (ExMR). To be filled according to template.

## 4 EXPERTISE PROFILE

NB: The same principal expert shall be mobilized across the two sub-activities.

### Principal expert (Expert 1):

**Area of expertise: Social protection policy**

Requirements (essential/required):

- *Education: university level (Masters or PhD relating to the subject are considered a plus)*
- *At least 15 years of professional experience within EU public administrations or, international organisations, academia, social partners, civil society;*
- *Relevant experience in designing, managing and/or evaluating social protection policies, particularly those related with social vulnerabilities and poverty alleviation;*

- *Significant experience and proved capacities in designing and managing monitoring and evaluation frameworks of social policies and programmes;*
- *Fluent in English, written and oral;*
- *Acute sense of diplomacy and institutional relations.*

Additional assets (advantageous in selection):

- *A previous experience in delivering short-term technical assistance in international cooperation;*
- *A previous professional experience in Palestine or the Middle East*

### **Expert 2:**

**Area of expertise: Monitoring and Evaluation of social policies and programmes**

Requirements (essential/required):

- *Education: university level (Masters or PhD relating to the subject are considered a plus)*
- *At least 10 years of professional experience within EU or regional (Middle East & North Africa) public administrations or, international organisations, academia, social partners, civil society;*
- *Relevant experience in designing and/or managing monitoring and evaluation frameworks of social policies and programmes;*
- *Fluent in English, written and oral;*
- *Acute sense of diplomacy and institutional relations.*

Additional assets (advantageous in selection):

- *A previous experience in delivering short-term technical assistance in international cooperation;*
- *A previous professional experience in Palestine or the Middle East*

### **Provisional work load (for each expert):**

5 days for the preparation; 8 days on-site; 2 days travel; 3 days reporting and finalisation of deliverables

## **5 REPORTING**

**Intermediate deliverables** (Methodological Note, Agenda) are to be transmitted to SOCIEUX+ at least three working days ahead of the activity, in A4 editable format, font size 12, single line spaced; the Methodological Note shall not exceed 3 pages, the Agenda 2 pages.

**Final deliverables** (the Action Report and the Final Deliverable) are to be transmitted to SOCIEUX+ Facility Management Team no later than 10 days working days after the Activity's completion. The AcR is based on a specific SOCIEUX+ format. The Final Deliverable shall be presented in in A4 editable format, font size 12, single line spaced.

A joint **Experts Mission Report (ExMR)** shall be prepared by the experts after the assignment, under the coordination and overall responsibility of the Principal Expert. The ExMR is based on a specific SOCIEUX+ format and should serve to inform on the (i) the objectives of the activity, (ii) the approach

and methodology applied, (iii) the main tasks performed, and results achieved. Furthermore, it shall contain (iv) an assessment of involvement of Partner institutions/participants and expected impact as well as give (v) some recommendations.

The reporting language is English. The provided templates and forms shall be employed. Once completed, all documents shall be sent by e-mail to: [gportacolone@socieux.eu](mailto:gportacolone@socieux.eu)

## **6 COMMUNICATION AND VISIBILITY**

SOCIEUX+ may use its own communication channels, such as web, newsletter and other media, to inform about this Action. In this purpose, the collaboration of the Partner will be appreciated, as well as the contributions of the mobilized experts. Thus, it is expected experts to be available for a brief talk, before and after the mission, with the Communication officer at SOCIEUX+, as well as to deliver other limited contributions for the purpose of communication, such as taking photographs, graphic material or provide short texts. In order to ensure the visibility of SOCIEUX+ and of the European Union in the course of the Action, the use of templates for presentations and the logo of the Facility will be promoted. Other visibility materials, such as brochures, USB sticks, notebooks and pens, among others, may be disseminated for specific activities.

## **7 CODE OF CONDUCT**

The experts mobilised by SOCIEUX+ will provide technical assistance from the preparatory stages of each activity to post-delivery follow-up. SOCIEUX+ will assist experts to fulfil their assignments by supporting and advising on the preparation of background materials prior to meetings. The SOCIEUX+ team will collect feedback from partner countries and ensure that mission reports and recommendations are delivered to national authorities, the EU Delegations in the partner countries and EuropeAid.

The experts mobilised are not representing SOCIEUX+ or the EU. Technical opinions and recommendations expressed are their own. They shall not express negative opinions on the implementation or actions supported by SOCIEUX+ to third parties. Nevertheless, they shall be aware of SOCIEUX's objectives and functioning, and promote the facility at the best of their knowledge, whenever possible and feasible.

Finally, the experts shall perform their duties in the Partner Country in a way that is fully compliant with and respectful of the local institutions, policies and cultural behaviours; they shall particularly adopt an institutionally sensitive behaviour in their way to deal with the local counterparts.

## **8 APPLICATION**

### **8.1 4.1 Documentation:**

Curriculum Vitae in *ENGLISH* and Europass format – available at:

<http://europass.cedefop.europa.eu/en/documents/curriculum-vitae/templates-instructions>



## 8.2 4.2 Submission of applications

Interested experts submit their application on the website: <https://pmt.socieux.eu>

The application process is the following:

1. If not already created, experts create their own personal SOCIEUX+ account (by clicking on “create an account”). To have access to all SOCIEUX+ Call for Applications, experts are required to fill out at least the fields marked with an asterisk.
2. Once their account is created and approved by the SOCIEUX+ team, experts sign in their personal account, click on the “Call for Applications” tab, identify the **19-25/WGB/3** position, and click on “Apply.”

If more information is needed, please contact SOCIEUX+ team by email to [experts@socieux.eu](mailto:experts@socieux.eu) with the application reference.

## 9 SELECTION PROCESS

If you do not receive a response within 30 days of the application deadline, please consider that your application has not been shortlisted.

Only short-listed applicants may be contacted. The selection process may include interviews by phone or other communication means.

Public civil servants or employees (active or retired) and private individual experts are eligible and preferred for this position. Private consultants may also apply.

Contracted public civil servants or employees (active or retired) are entitled to standard fixed allowances of 250 Euro per working day. Fees for private consultants will be negotiated based on the number of years of relevant expertise of the selected applicant.

Interested candidates may download the **Guide for Experts with detailed information on contracting with SOCIEUX+** at [www.socieux.eu](http://www.socieux.eu)

## 10 DISCLAIMER

The proposed activity and mission are subject to the final review and approval of SOCIEUX+ Quality Assurance Committee. A confirmation of dates of missions and contracting of experts may only be confirmed upon the formal approval.

Short-listed candidates may be required to provide contact of employer or proof of their ability to be directly contracted under their status as civil servant or public employee.

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## About SOCIEUX+

The European Union (EU) promotes and maintains dialogue on social protection and inclusive employment policies with an increasing number of partner countries. This effort has been confirmed by the European Commission (EC) Communication COM (2016) 740 final - "Proposal for a new European Consensus on Development, entitled *Our world, our dignity, our future*. A significant number of cooperation initiatives in these fields are funded by geographic or thematic instruments of the EU in different countries. Those initiatives are highly structured and address the medium- to long-term needs of partner countries. However, short-term measures and peer-to-peer cooperation to promote the development of social protection systems are needed to complement the EU's cooperation with third countries. SOCIEUX+ - EU Expert Facility on Employment, Labour and Social Protection responds to this need.

The SOCIEUX+ facility was setup and funded by the EU through co-funding from France, Spain and Belgium and the resources managed by the European Commission's Directorate for Development and Cooperation (EuropeAid) and co-funding from the of. The facility is implemented by a partnership composed of development cooperation agencies from Member States: Expertise France (the partnership lead), Fundación Internacional y para Iberoamérica de Administración y Políticas Públicas (FIIAPP) from Spain, Belgian International Cooperation on Social Protection (BELINCOSOC), and the Belgian Development Agency (Enabel).

The general objective of the Facility is to expand and improve access to better employment opportunities and inclusive social protection systems in partner countries. Its specific objective is to enhance the capacities of partner countries to better design, manage and monitor inclusive, effective, and sustainable employment strategies and social protection systems through short-term, peer-to-peer technical assistance and knowledge development.

SOCIEUX+ recognises the impact of social protection and employment in reducing poverty and vulnerability. It supports the efforts of partner governments in promoting inclusive and sustainable social protection and employment systems. SOCIEUX+ also complements the efforts made through other European Union initiatives. The Facility is an expansion of SOCIEUX Social Protection EU Expertise in Development Cooperation, established in 2013.

