Terms of Reference for end of project evaluation

Young Entrepreneurs Program in the Eastern Caribbean (YEPEC), 2012 - 2015

Youth Business International (YBI) seeks the services of a skilled evaluation consultant to undertake an external evaluation of a three year project, funded by the United States Agency for International Development (USAID). The overall aim of the project was to deliver ‘a continuous and sustained campaign to help reduce the impact of youth unemployment on communities and individuals in the region through youth entrepreneurship’. The project started on 1 April, 2012 and will end on 31 December, 2015. This evaluation is intended to feed into project closure activities, including a regional event, which will take place September 23 - 25, 2015. The evaluation is likely to include up to 2.5 weeks in the field.

About Youth Business International - Responsible for overall Grant Management of this project

YBI is a global network of independent not-for-profit initiatives that each supports under-served young entrepreneurs to start and grow sustainable businesses. Youth is typically defined by members as aged 18-35, and under-served means: unable to access the financial, knowledge or human capital needed to start and grow a business.

Members provide services relevant to the needs and gaps in their local market, from expanding awareness of entrepreneurship to helping sustainable businesses grow, based on a shared network belief that supporting underserved young entrepreneurs through integrated financial and non-financial support is central to driving economic and social development.

All YBI members subscribe to core network principles, and we are growing our network to reach increasing numbers of potential young entrepreneurs across the world. Our network approach is critical to how we achieve impact. Working collaboratively through locally-based and locally owned in-country initiatives enhances the legitimacy, relevance and effectiveness of our work. Facilitated by a London-based team, the network helps drive the scale and quality of support provided to under-served young entrepreneurs.

Programme Description

Through the YEPEC, YBI set out to lead the development of youth entrepreneurship activities in the Eastern Caribbean by adopting a multi-level intervention approach focusing growth of business start-ups.

To this effect, YBI, in conjunction with locally-based Youth Business Trusts (YBTs) in Barbados; Saint Vincent and the Grenadines; Saint Lucia, Trinidad and Tobago and Dominica, agreed to:
1. Build a strong and active community of youth entrepreneurship practitioners by developing a Centre of Excellence that will create and share good practice, as well as promote the cause of youth entrepreneurship in the region;

2. Enhance the quality of YBT support services to young entrepreneurs by leveraging global, regional, and local knowledge and expertise

3. Increase the number of young entrepreneurs starting up in business in the Eastern Caribbean by expanding the number of youth entrepreneurship initiatives as well as increasing the number of support activities to young entrepreneurs by existing Youth Business Trusts

Following year one of the project, challenges were identified with the Centre of Excellence, which resulted in the programme being on hold for 12 months. In August, 2014, Youth Business International submitted and was granted a modification request in response to these challenges, including replacement of the physical Centre with a virtual Centre to address the regional goals of the programme and increase the amount of funds going directly to 5 YBTs.

Programme Objectives

The programme targeted the following key objectives:

1. Business creation: optimize the number of young people supported to become entrepreneurs
   - Launch 150 new entrepreneurs in business with loans from non-federal sources, and provide business start-up support to at least 3000 young entrepreneurs.

2. Outreach: Build awareness of opportunity through youth entrepreneurship
   - Raise awareness of youth entrepreneurship in over 20,000 young people in the Eastern Caribbean region
   - Outreach to 200 educational institutions (including those participating in Junior Achievement and Cave Hill School of Business entrepreneurship programs)

3. Build the capacity of YBTs to support young entrepreneurs
   - Increase capacity & strengthen 3 existing YBTs
   - Train & up-skill trust management & staff: train at least:
     - 40 board members
     - 30 managers & Trust team
     - 200 business mentors
   - Develop at least 140 new partnership with donors & in kind contributors

4. Improve the quality of support available to young entrepreneurs
   - Host 1 regional trade show for young entrepreneurs
5. **Expand the number of YBTs in the region**
   - Develop & pilot new members in St. Lucia, Antigua & St. Vincent & the Grenadines
   - Establish youth entrepreneurship initiatives in 2 new locations - St. Kitts & Nevis and Grenada

6. **Establish the Caribbean Centre of Excellence for Youth Entrepreneurship Development (Caribbean Youth Entrepreneurship Hub)**
   - Facilitate the exchanges of 19 (6 per year) intra-regional visits between young entrepreneurs, business mentors and trust team
   - Conduct at least 2 quality control visits to each YBT per year

7. **Research, collate and share lessons learned to establish best practice across the region**
   - Achieve at least 3 interfaces with government per YBT per annum
   - Host annual national seminar to promote and share knowledge about entrepreneurship
   - Host National Awards to recognise mentors, entrepreneurs & partners
   - Facilitate one regional survey and publication promoting entrepreneurship, exploring lessons learnt & the impact of youth entrepreneurship on Caribbean GDP
   - Develop at least 60 new partnership with donors & in kind contributors
   - Create 3 promotional videos capturing success stories and information about the region
   - Publish at least 10 regional case studies of successful entrepreneurs and mentors
   - Facilitate at least 2 interfaces with regional governments and bodies per annum
   - Lobby policy makers to integrate entrepreneurship into policy through at least 3 workshops across the region drawing on our research

Basic outputs have been tracked through individual YBT databases and compiled centrally by YBI. Outcomes are being tracked retrospectively through basic surveys, however this evaluation is intended as the main vehicle for outcome assessment.

**Evaluation Stakeholders**

The results of this evaluation are primarily intended for internal use by the YBTs and Youth Business International to inform future improvements and to transfer learning across the YBI Network. Results and findings will also be shared with the funder, USAID for accountability reasons and to share with partners. Relevant results and lessons learned will be shared with other stakeholders, including young entrepreneurs, other YBI network
members and other actors within the youth entrepreneurship sector at the discretion of the donor, YBI and the YBTs concerned.

Objectives of the Evaluation

The objectives of this evaluation are to:

1. **Undertake an evaluation to assess the project’s:**
   
   a) **Relevance** - the extent to which the objectives were consistent with beneficiaries’ needs and priorities
   
   b) **Effectiveness** - the extent to which the targeted project objectives were achieved (or are expected to be achieved)
   
   c) **Efficiency** - how economically resources/inputs were converted into results
   
   d) **Sustainability** - the extent to which the benefits are likely to continue after the project
   
   e) **Impact** - where possible, the long-term effects produced by the project (directly, indirectly, intended, unintended, positive and negative).

The evaluation should assess the above in relation to two central broad questions:

I. **What** changes / outcomes / achievements have taken place?

II. **How** have these changes / outcomes / achievements been brought about?

In relation to this, the evaluation should consider the following sub-questions:

**What?**

- What have been the unintended and unexpected outcomes of the project activities (both positive and negative)?
- Who has benefited (men, women, youth), in what ways?
- Have any changes been achieved in relation to policy / practice / attitudes of decision makers / policy makers etc. in the countries where the project is working?
- To what extent has the achievement of the changes and outcomes been influenced by external / other factors?
- To what extent have the project activities contributed to the changes and outcomes identified?

**How?**

- How accurate is the ‘logic chain’ that was articulated at modification stage of the project? Is it effective, where were the gaps, how should it be adapted and improved for the future?
- What were the most effective approaches used by the YBTs and YBI to bring about change? What worked and what didn’t?
- What overall lessons have been learned and how have the organisations involved improved?
- How have relationships between partners helped or hindered the ‘delivery of changes / outcomes’? How can these relationships be improved?
• How effective have the project’s monitoring, management, learning and financial systems been? How can these be improved?

2. Provide recommendations for future improvements.
   As mentioned above, learning from this evaluation should feed into future plans for expansion and scale-up of youth entrepreneurship support in the region. Learning will also be applied to inform other projects and programmes across the network, where relevant. The evaluation should be strongly focused on recommendations for improvement relating to the central questions outlined above, and in particular - if and how activities could be adapted to better meet the needs of the target beneficiaries.

Methodology

The evaluation should consist of:

(a) Review of project documentation: Review of archived material related to the project. This could include, but is not restricted to: annual and quarterly reports, communications between YBI, YBTs and USAID, the original project proposal document, the basic ‘logic chain’, all relevant project records and data, training materials etc. this information will be provided to the evaluator by YBI and the YBTs. The evaluator would also be expected to review any other relevant statistics and secondary sources.

(b) Development of an evaluation approach and data collection tools / methods: this should include;
   - Detailed time line and work plan
   - Outline of any proposed changes to the scope of the evaluation
   - Key learning questions
   - Proposed sampling framework
   - List of stakeholders to be consulted, and
   - Development of associated data collection and evaluation tools

The YBTs and YBI welcome the use of mixed methods, and particularly participatory evaluation methods that are fun and engaging for the youth and stakeholders participating. We would like to involve programme participants in validating and interpreting evaluation findings and results wherever possible.

Sample size: Based on an overall target of support provision to 3000 participants, a sample size of approximately 340 participants is required for this evaluation. However, the exact sampling framework is to be proposed by the consultant and YBI is open to alternative approaches.

Stakeholders to be consulted: The consultant should plan to include the following groups of stakeholders in the evaluation:

- Direct project participants in at least 3 of the 5 participating countries of the Easter Caribbean (potentially disaggregated by those who attended different parts of the programme)
- YBT implementing staff
- Relevant YBI staff
- Wider stakeholders (YBI and the YBTs will advise at evaluation design stage) - for example members of the YBT boards, the donor, community leaders, local government representatives etc.

(c) **Participate in an inception briefing with YBI, with remote participation from YBTs:** This should take place immediately prior to the development of the inception report.

(d) **Field visits:** Field visits will take place in two-three of the five participating Eastern Caribbean countries, and should include an agreed sample of participants and stakeholders. This is expected to require between 2-3 weeks, depending on the exact methodology. This should also include time spent with project staff in YBT head offices, as well as remote interviews with relevant members of the YBI team and other YBTs.

(e) **Presentation of preliminary evaluation findings at the Regional Learning Workshop in September:** using either a draft set of results or PowerPoint presentation to summarise preliminary findings and recommendations. This would be required to take place immediately after the field work has been completed, while the consultant is still in the region.

(f) **Submit a draft evaluation report:** of no more than 30 pages that corresponds to the requirements outlined below in the ‘Deliverables’ section.

(g) **Submit a final evaluation report:** incorporating any relevant feedback from the YBTs and YBI.

**Deliverables**

Deliverables should include the following:
- An evaluation work plan / inception report, including: planned timeline, methodology / approach, planned stakeholders to be consulted and sampling framework, data collection and analysis tools, qualitative and quantitative protocols for data collection and analysis
- Any suggested improvements to existing evaluation scope, as outlined in this document
- Presentation of preliminary findings
- Draft evaluation report written in English that meets the requirements outlined below
- One (1) electronic file of the clean (final) qualitative and quantitative data collected
- Final evaluation report

The final evaluation report should be jargon free, clear and simply written. The main body of the report should not exceed 30 pages and should include an executive summary, brief project background and recommendations. Technical information should be included in appendices only. Analysis of project achievements should always be backed up with relevant data, with reference to the data source. Recommendations should be specific and include relevant details for how they might be implemented.
The structure of the report should cover the following:

- Executive summary (approximately 10% of the final report)
- Brief project background (approximately 5%)
- Main findings relating to the evaluation questions and including detail of any unintended outcomes that are resulting from project activities (At least 50 - 55%)
- Recommendations for future action (At least 30%)

In addition, the final report should contain at least the following annexes:

- Terms of Reference for final evaluation
- Itinerary
- List of meetings attended
- List of persons interviewed
- Details of evaluation methodology and tools
- Summary of field visits
- List of documents reviewed
- Any other relevant material, including data collection tools

**Indicative schedule of activities**

The evaluation is expected to be undertaken before the end of October, 2015. It is essential that the final report is submitted to YBI before October 19th.

Applications for this consultancy should be emailed to annie.barber@youthbusiness.org by 9am (UK British Summer Time) on Monday July, 13th, with ‘YEPEC Evaluation’in the subject line.

An indicative timeline for the evaluation is provided below:

<table>
<thead>
<tr>
<th>Key Tasks</th>
<th>Time Period</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Inception Meeting</td>
<td>27th July</td>
<td>London, UK</td>
</tr>
<tr>
<td>Review of background materials and literature review</td>
<td>27th July - 14th August</td>
<td>Remote</td>
</tr>
<tr>
<td>Submission of inception report</td>
<td>3rd August</td>
<td>Remote - via Skype and video-conferencing where possible</td>
</tr>
<tr>
<td>Submission of final tools (after a maximum 3 reviews from YBI and YBTs)</td>
<td>28th August</td>
<td>Remote - via Skype and video-conferencing where possible</td>
</tr>
<tr>
<td>Field work: interviews with YBTs and YBI staff; field visits</td>
<td>31st August - 21st September</td>
<td>Selected countries in Eastern Caribbean</td>
</tr>
<tr>
<td>Presentation of preliminary findings at regional event</td>
<td>24th September</td>
<td>Barbados</td>
</tr>
<tr>
<td>Draft report submitted</td>
<td>5th October</td>
<td>Remote - via Skype and video-conferencing where possible</td>
</tr>
<tr>
<td>Feedback from YBI and YBTs on draft report</td>
<td>12th October</td>
<td>Remote - via Skype and video-conferencing where possible</td>
</tr>
<tr>
<td>Final report submitted</td>
<td>19th October</td>
<td>Remote</td>
</tr>
</tbody>
</table>
Contract and reporting details

Type of contract. The consultant will be offered a fixed-price contract to include all the activities and deliverables listed above.

Reporting. The consultant will report to the YBI Monitoring, Evaluation and Learning Advisor for evaluation deliverables, and to the YBT Directors for all issues related to in-country logistics and field work.

Qualifications, experience and skills. Preference will be given to applicants with the following:

- At least a master’s degree, in any social science, preferably including gender, youth, livelihoods, evaluation or social research;
- Proven experience in evaluations, including 5 years of working experience in carrying out evaluations;
- Demonstrated understanding of the entrepreneurship and livelihoods sector;
- Good understanding of the Latin America and Caribbean region, particularly of the Eastern Caribbean islands;
- Ability to produce well written, analytical reports in English essential;
- Knowledge of evaluation of capacity building activities;
- Both quantitative and qualitative data collection and analysis skills;

Proposals should be no longer than 5 pages, (excluding CVs, budget and example piece of work). Proposals should include:

- Short overview of how the candidate meets the qualifications, experience and skills requirements (no more than one page);
- Description of proposed approach

Candidates will only be considered if they also submit the following:

- An up-to-date CV - including only relevant information;
- Detailed budget - including projected travel and in-country accommodation and subsistence costs;
- An example piece of work from a similar assignment

Maximum budget available

Please note, the maximum budget available for this evaluation is: **USD 40,000**

This would need to include travel and accommodation expenses (note, we are open to the evaluator visiting up to 3 of the 5 Caribbean islands involved in this programme to minimise cost, supplemented by remote data collection and desk-review). The budget must also include VAT where applicable.