



TERMS OF REFERENCE -

Evaluation of the Learning & Development Outcomes and Processes in PIND

1 BACKGROUND

Foundation for Partnership Initiatives in the Niger Delta (PIND) is a Nigerian non-profit Foundation established in 2010 with initial funding by Chevron Corporation to support a portfolio of socio-economic development programs for Nigeria's Niger Delta in order to improve standards of living of communities in the region. PIND supports projects in collaboration with a diverse range of donor partners including bilateral and multi-lateral aid agencies, federal and state government agencies in Nigeria, private companies and foundations. With an overarching goal of increasing income and employment in the region, the Foundation has four distinct but interrelated program areas. They are:

- An **economic development program** focused on generating opportunities for pro-poor market development and employment generation.
- A **capacity building program** that will build the service delivery and engagement capacity of government, civil society and communities.
- A **peace-building program** that strengthens conflict resolution mechanisms for enabling integrated peace and economic growth.
- An **analysis & advocacy program** that improves analysis and understanding of systemic constraints to growth in the Niger Delta region.

PIND began a formal process of training and development in 2014 as part of its knowledge management (KM) framework to ensure its consultants have the right skills and knowledge to deliver on both their individual specific and organizational objectives. Prior to this, trainings took place albeit in a non-systematic way. Each year, it develops a training and development plan identified through annual performance management recommendations, knowledge management audit and organizational reviews/observations.

Additionally, in 2014, the ODP (Organizational Development Project) was setup in PIND with three core objectives which include:

- The strengthening of technical skills of PIND long term consultants
- Improving organizational learning abilities
- Developing PINDs systems for better management of resources

The ODP key focus areas for capacity building included:



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- Management/leadership development and succession planning
- M&E
- Knowledge Management and information systems
- Accounting, budgeting and financial management
- Governance and compliance
- Grant making, contract and procurement
- Mainstreaming gender and youth
- Partnership development and fundraising
- Technical skills building for long term consultants

Since 2014, PIND has developed and implemented 5 annual training and development plans using a consultative process between the HR, KM team, managers, senior management and consultants; has developed a training and development process flow chart which articulates roles and responsibilities within the development/implementation process; and has held two assessment surveys to get internal feedback on the process and relevance. PIND has also developed an M&E framework for monitoring and reporting on the implementation of the plan and achievements. . The ODP ended in 2018 and PIND seeks to evaluate the performance of the project.

2 PURPOSE OF ASSIGNMENT

This evaluation is aimed at determining the effectiveness of the training and development strategy/process in PIND as well as the outcomes of the training and development activities from inception till date (this could include trainings undertaken before 2014 where data is available). The evaluation would take a detailed look at the whole learning and development strategy/process from top to bottom, identifying key success factors as well as gaps and opportunities for improvement. The evaluation is expected to produce recommendations for the improvement of the strategy/process, and develop a new 5-year learning & development strategy and plan for 2020-2024 that includes M&E framework for monitoring and tracking the plan.

PIND expects a credible and industry-accepted standard and approach to be used as PIND intends to use information gathered to show clear results from its efforts so far, further improve its training and development interventions, identify lessons learned, and make decisions about resource allocation to same.

3 SCOPE OF WORK

The evaluation should help to answer questions relating to the training development efforts impact, effectiveness, efficiency and relevance.

- Impact: What changes did the training and development effort bring about? How did these contribute to the organizational mission and objectives?
- Effectiveness: Were the training and development objectives achieved? Did the outputs lead to the intended outcomes? Were the objectives and outputs properly tracked?



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- Efficiency: Were the right trainings identified and delivered to consultants at the right time, and in the right way at the right cost?
- Relevance: Were the training and development objectives relevant to both consultants' needs and PIND organizational objectives? Were both development and training properly mainstreamed or was it skewed towards either of them? Was there adequate prioritization and fairness/equity in the training and development allocation?

These questions above are not exhaustive but a guide on types of questions to be answered through this evaluation. Consultant is expected to provide an inception plan that lists detailed questions including data gathering tools to PIND.

PIND will welcome Consultant to propose methodologies and approaches he or she feels will help clearly bring about the objectives of the evaluation as well as respond to the key information areas outlined. It is expected that Consultant will submit detailed methodology including data collection tools, work plan, and analytical framework for the evaluation. PIND will agree and finalize the management and coordination arrangements for the evaluation after Consultants have been selected.

This evaluation will involve qualitative and quantitative methods and will use the recommendations to inform new learning and development strategy for PIND's next strategic phase. It is the sole responsibility of the Consultant to deliver the following:

1. Inception report
2. Draft and final reports of the evaluation
3. A proposed learning and development strategy/plan that aligns with the findings for PIND's next strategic phase
4. An M&E framework and plan for monitoring and tracking the new learning and development strategy

The Consultant will use methodologies and techniques as determined by the specific needs for information, the objectives set out in the TOR, and the availability of resources. In all cases, the Consultant is expected to analyze all relevant information sources, such as training reports, training plans, PIND project documents and reports and any other documents that may provide evidence on which to form opinions.

The Consultant is also expected to use interviews and surveys as a means to collect relevant data for the evaluation as necessary. In order to use existing sources/information and avoid duplication, secondary data will be mainly collected from various information sources through a comprehensive desk review that will include the analysis of relevant documents, information, data/statistics, triangulation of different sources etc.

The methodology and techniques to be used in the evaluation should be described in detail in the inception report and the final assessment report, and should contain, at a minimum, information on the instruments used for data collection and analysis, whether these be document, interviews, field visits, questionnaires or participatory techniques.



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The evaluation will be carried out through a wide participation of relevant PIND team members. Field visit for data gathering may be necessary while briefing and debriefing sessions with PIND are envisaged. Data collected should be disaggregated (by sex and work stream such programs and non-programs), where possible and necessary.

The Consultant is expected to propose a Research Assistant to support him or her in the data collection, transcription and analysis as part of the bid for the assignment. The profile (CV) and cost of the Assistant must be included in the bid as this would be part of the evaluation and selection criteria.

4 ACTIVITIES AND TIMELINE

Time inputs for the consultant are in the table below. The scope of work above is broken down to key activities, with the total number of days required to deliver each:

Description of activities	Day input	Associated Deliverables
<p>T1. Preliminary meetings with <i>relevant</i> PIND Foundation officers in charge of Communications.</p> <p>(First, a 0.5-day briefing meeting to clarify objectives and scope of work. Second, a 0.5-day presentation of evaluation methodology/protocol to PIND.</p> <p>The second 0.5-day meeting will come at least 3 days after the Consultant have developed and submitted inception report. <i>Each meeting will not be more than 0.5 day</i>)</p>	1	Not applicable
T2. Draft inception report, including evaluation methodology and tools	2	D1
<p>T3. Desk review of related documentation and materials</p> <p>Data collection from select PIND team members both in Abuja and in the region</p>	10	D2
T4. Review and synthesis of data to identify key themes and patterns	4	Not applicable
T5. Make presentation of evaluation findings to PIND Foundation	0.5	<u>D3</u>
T6. Draft and finalize evaluation report	4	D4
T7. Develop a new 5-year learning and Development strategy and plan for PIND that aligns with the findings and	5	D5



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	recommendations from the evaluation and includes an M&E framework		
	TOTAL DAYS	26.5	

5 DELIVERABLES

Deliverables stated in the table below are directly linked to specific tasks in previous section. Due dates are tentative and dependent upon contract execution by mid-April.

Item	Due date
D1. Draft and final inception report	May 2019
D2. Transcript of interviews to be submitted along with final report <i>Relates to T3</i>	May 2019
D3. <u>PowerPoint decks</u> of headline results, including the methodology, limitations and recommendations Presentation of headline results and recommendations to PIND <i>Relates to T4-T5</i>	June 2019
D4. A well-written <u>draft evaluation report</u> . Written in English for a non-academic audience. <u>Final evaluation report</u> , inclusive of summaries and conclusions. See Annex 1 for outline of report <i>Relates to T6</i>	June 2019
D5. A simple and articulate 5-year learning and Development strategy and plan for PIND that includes an M&E framework <i>Relates to T7</i>	June 2019

6 DURATION

The Consultant in discussion with PIND Foundation will agree to a suitable timeline and schedule for the evaluation. The activities are expected to be carried out within from May to end of June 2019 with contract closed out at no later than October 31, 2019.

7 COSTS

The interested individual(s) will propose daily fees for the assignment which shall be subject to PIND's procurement rates. Payment can be one-time upon submission of all deliverables or in two instalments in the following order, depending on the preference of the Consultant:

First tranche: Completion and approval of D1 – D4

Second tranche: submission and approval of D5

PIND Foundation will provide any logistics requirements (transport/accommodation/feeding) that may arise in the course of the assignment.

8 QUALIFICATIONS / SELECTION CRITERIA

Given the objectives, scope of work and expected outputs of this engagement, the Consultant is expected to possess relevant qualifications and extensive work experience in learning and development and organizational development, with a good understanding of non-profit sector communications dynamics.

Preference will be given to individuals with evidence of undertaking similar task. The consultant should have the following qualifications and experiences;

- Consultant(s)/firm should have not less than 5 years of relevant experience in evaluating learning & development initiatives plus experience in organizational development and business process improvement
- Good understanding of monitoring and evaluation framework for learning and development will also be required
- Good presentation and report writing skills
- Ability to communicate effectively with and relate to people of different cultures, demonstrating ability to see issues from others' perspectives.
- Availability to complete the work within stipulated timeline

9 HOW TO APPLY

Interested persons should submit the following application documents:

- A. Expression of interest (maximum 4 pages sides of A4) a) detailing how the Consultant meets the selection criteria and b) their understanding of the TOR and methodology.
- B. Copy of CV of the consultant and a Research Assistant who will undertake the evaluation and strategy development (maximum 6 sides of A4 each);
- C. Financial proposal detailing consultant and Research Assistant's itemized fees;
- D. One recent example of similar report written by the applicant (if joint authored to include a description of the role of the named consultant(s) in the report);
- E. Contact details of two independent referees



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In addition, these mandatory items **MUST** be submitted along application documents:

1. Certificate of business registration (for firms) / Means of personal identification (for individuals)
2. Profile of organization or CV of the individual consultant(s) as in B aforementioned
3. Most recent Tax clearance certificate
4. Tax identification number
5. Full physical contact address
6. Bank reference letter
7. Bank details as follows:
 - i. Name of Account
 - ii. Account Number
 - iii. Name of Bank
 - iv. Address of Bank

The application documents should be sent no later than April 22, 2019 to procurement@pindfoundation.org

Non-Discriminatory Clause:

PIND Foundation provides equal opportunity in employment and engagement for all persons, vendors and contractors, and prohibits unlawful discrimination and harassment in all aspects of contractual engagement or employment because of age, sex, gender, marital status, disability, nationality, race, religion or any fact.



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Annex 1: Learning and Development Evaluation Report Format

Title Page: Title, Address of PIND Abuja Office, Name of Primary Contact, Name of Assessor, Time-frame of evaluation, Date of Report, Name of Organization commissioning evaluation, PIND Logo

Table of Content: Main headings and page numbers

Executive Summary (3 pages): A description of the assignment

- A description of the purpose of the evaluation and the objectives
- Main audiences and users of the review findings
- A short description of evaluation methods
- Short summary of key findings, conclusions and recommendations

Introduction (1 page): Explanation of the context in which this evaluation was conducted.

- Information about PIND
- A description of why the evaluation was conducted (purpose) and why is it being conducted at this particular point
- A description of who the primary audience and users of the evaluation

Evaluation Methodology (1-2 pages): evaluation Scope: name of geographical areas, data gathering time period

- Data Sources: Type of data collected (Documents, Surveys, KIIs etc)
- evaluation Team and corresponding responsibilities
- Ethical considerations
- Limitations to methodology

Key Findings (10-15 pages max): In this section, the evaluation questions must be answered using evidence and data. This section should be structured in a way that the reader can easily make connections between the purpose of the evaluation and the data gathered.

- Include if there is any variances between planned and actual results
- Assumptions or risks should also be stated

Conclusions (1-2 pages): Summarize any overarching lessons learned and insights gained, for instance what new knowledge was gained about the PIND learning and development intervention that can be applicable in future contexts

- Highlight strengths and weakness of the PIND learning and development intervention
- Conclusions should be based on evidence and address the PIND learning and development intervention evaluation questions

Recommendations (1-2 pages):

- Practical, feasible recommendations for the intended users (PIND Learning & Development Team, Executives or others) should be included.
- Recommendations should be supported by evidence gathered and linked to conclusions related to PIND learning and development intervention evaluation objectives
- Recommendations should be action oriented



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1. Notes on house style

- Submit your draft reports in MS Word using Calibri pt 11 and 1.0 line spacing
- Use endnotes rather than footnotes
- Spell out acronyms on first use
- Indicate panels by adding 'PANEL' to the sub head. **Do not** format panels using shading or broader
- Use American English (rather than British) and 'z' endings (rather than 's'), e.g. organization. The exception is when keeping an organization's name in the original spelling
- Use 'single quote marks' as standard, but "double" for quotes within quotes (within main body of text) and direct speech.