



AMERICA FOR BULGARIA
F O U N D A T I O N
Фондация Америка за България

**Request for Proposal
for
Evaluation of the Effectiveness and Efficiency of the Trust for Social
Achievement Foundation's Programs**

**Sofia
February 2016**



Letter of Invitation

America for Bulgaria Foundation (ABF) is issuing a Request for Proposal (RFP) for the development of an evaluation methodology and conducting an evaluation of the effectiveness and efficiency of the programs and approaches applied by the Trust for Social Achievement Foundation in achieving its mission to test and support innovative, results-driven approaches that increase self-sufficiency and improve life outcomes for Bulgaria's poor, with a focus on the Roma. ABF is soliciting responses from organizations (companies and NGOs) or consortia with experience in sociological research practices and results-based impact evaluation. Respondents will be competing to provide the services set forth herein in the Terms of Reference. The submissions of all Respondents shall be compared and evaluated pursuant to the evaluation criteria set forth in this RFP and a single Respondent shall be selected.

This RFP does not commit ABF to select any organization, award any work order, pay any cost incurred in preparing a response, or procure any services or supplies. ABF reserves the right to accept or reject any or all proposals received, cancel or modify the RFP in part or in its entirety, or change the RFP guidelines, when it is in the best interest of ABF to do so.

Selection Criteria:

1. Adherence to solution requirements and appeal of proposed solutions;
2. Experience in design, implementation, and evaluation of educational, early childhood development, and economic programs;
3. Strong knowledge of education and employment sector structures, systems, and policies in Bulgaria;
4. Experience in sample design, devising qualitative and quantitative methodology and implementing social studies and impact evaluations;
5. Appeal of non-specified additions to improve quality of collected data and analysis.

Proposals should include:

1. A cover letter;
2. A description of the proposed approach/methodology for carrying out the assignment;
3. Statement of Qualification of the Organization, including samples of relevant previous pieces of work, and contact list for tentative recommendations;
4. Staff qualifications (CVs of the proposed key experts);
5. Detailed Cost Proposal in USD broken down in categories;
6. Conflict of interest disclosure.



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The deadline for submission of proposals is **6:00 p.m. Sofia time on February 26, 2016**. Late submissions won't be considered. Proposals shall be submitted in electronic format to itzankova@americaforbulgaria.org with a copy to IBossev@americaforbulgaria.org

Yours sincerely,

Ivanka Tzankova
Director, Impact Assessment and Evaluation



Terms of Reference

1. Background Information

America for Bulgaria Foundation (ABF) supports efforts to strengthen a vibrant market economy in Bulgaria. One program area focuses on providing support to the economically disadvantaged, wherein ABF provides a significant grant to the Trust for Social Achievement Foundation. ABF established the Trust for Social Achievement (TSA) Foundation in October 2012 with the mission to test and support innovative, results-driven approaches that increase self-sufficiency and improve life outcomes for Bulgaria's poor, with a focus on Roma. TSA focuses on three key areas:

- Early childhood development (maternal and infant health and increased school readiness);
- Educational achievement and drop-out prevention;
- Access to economic self-sufficiency;

2. Description of TSA's Program Goals

In order to achieve its mission, TSA has set the following long-term goals for each program area:

Long-term goals for *Early Childhood Development*:

- Increased enrolment in high-quality schools
- Improved school performance and retention
- Increased maternal/infant health

To achieve these goals, TSA supports activities that sustain the following outcomes:

- *Improved participation in preschool/kindergarten*
- *Increased school-readiness (social and cognitive skills)*
- *Reduced teen pregnancies/ increased spacing of pregnancies*
- *Reduced 0-4 year healthcare encounters (for injuries and ingestions) and fewer pre-natal infection*

Long-term goals for *Educational Achievement*:

- Higher graduation rates
- Better educational outcomes
- Increased reciprocity and role models

To achieve these goals, TSA supports activities that sustain the following outcomes:

- *Improved enrollment and attendance*
- *Decreased drop-out rates*
- *Higher academic grades and achievements*



- *Increased completion rates (including 8th grade and high school diplomas)*
- *More volunteers and positive public recognition/identification*

Long-term goals for Economic Self-Sufficiency:

- Increased employment
- Increased land/home-ownership
- Increased reciprocity and positive role models

TSA supports activities that sustain progress toward the following outcomes:

- *More placements in internships and training opportunities*
- *Increased employability through improved skills and competencies*
- *Improved partnerships with businesses*
- *Increased minority-owned small businesses/ individual enterprises*
- *Higher numbers of tax-payers in segregated communities*
- *Improved access to public services in segregated communities*

In the first three years of its operation, TSA has approved and launched 154 **projects**, which include grants, donations, and operational initiatives. The table below summarizes the number and amount of funding for these projects:

Program Area	Number of Projects	Committed in BGN	Disbursed in BGN	Percent Disbursed	Average Project Size
Early Childhood Development	13	2,296,982	700,971	31%	176,691
Educational Achievement	64	3,995,234	2,842,479	71%	62,426
Economic Self-Sufficiency	25	1,786,389	1,258,518	76%	71,456
Capacity Building Other	8	120,654	57,695	48%	15,082
Springboard for School Readiness (SSR) – including grants and operational expenses	41	2,574,870	2,274,692	88%	62,802
Zoning Project	3	805,003	116,828	15%	268,334
Totals	154	11,579,132	7,351,182	63%	75,189

Annex 1 includes color maps to demonstrate TSA’s geographic reach.

For more information about TSA programs and grants, please visit their website:
<http://socialachievement.org/en/>



3. Evaluation Objectives and Expected Results

The overall goal of the evaluation is to assess the outputs, outcomes, and efficiency of the TSA Foundation. The three main objectives are:

1. Assess to what degree TSA projects contribute to the strategic goals identified for each program area; identify where TSA has made the most progress toward achieving these goals and where TSA programs have fallen short of their strategic goals.
2. Review TSA's hybrid program structure (operational programs vs. traditional grant making) to assess how staff resources are aligned to support the differing approaches and how cost-efficiencies, overheads, results, innovation, relevance, social impact, and sustainability prospects vary between the differing approaches.
3. Analyze TSA's sustainability prospects.

The evaluation shall answer the following research questions:

1. To what extent do TSA programs contribute to ABF's mission for assisting in strengthening of a vibrant market economy and ABF's strategic program goal for assisting the economically disadvantaged?
2. Identify areas where TSA programs are successfully contributing toward program goals – specify the bright spots and discuss prospects for replication and sustainability of good models.
3. To what degree are TSA's programs falling short of TSA's mission and program goals?
4. Identify and evaluate several individual grantees and determine the extent to which the outputs and outcomes of their projects contribute to TSA's and ABF's program goals?
5. Assess the suitability of TSA's program approaches by comparing the cost efficiency, cost per beneficiary split by direct and indirect cost, short-term results, potential for long-term social impact, relevance, and sustainability of the organization's different instruments (i.e. demand-driven grant-making vs. TSA-designed/operational initiatives.)
6. To what degree has TSA become an active participant in influencing public policy and legislation in its areas of interest in its three years of operation?
7. To what extent do TSA programs benefit other economically disadvantaged groups?
8. What are the existing sustainability prospects for both TSA and the grantees it supports? This includes, but is not limited to:
 - a. A desk review and description of other donors that provide support to Roma-related programs in Bulgaria, including their overall budgets for 2016 – 2020, requirements and criteria for applicants, priority funding-areas, selection procedures, and maximum amounts available per applicant;



- b. A desk review and description of EU funding options for Roma-related projects in the new funding cycle (2014-2020) including requirements and criteria for applicants, priority funding-areas, selection procedures, and maximum amounts available per applicant. Which of these funding streams would TSA be eligible and qualified to apply for and which would best fit its mission and long-term goals? Which of these funding streams would TSA grantees be eligible and qualified to apply for?
- c. To what degree are the organization's projects designed with an eye toward sustainability? What is the current funding environment in Bulgaria and how will this impact their sustainability? To what extent does TSA's hybrid structure (being both a funder and an implementer) allow the organization to get access to available funding?
- d. Review of TSA's development strategy – including a review of TSA's fund-raising efforts, the level of board involvement, major gift donors, creation of its long-term fundraising and contingency strategy, training of staff, pipeline of good projects seeking funding, etc.

4. Scope of the Evaluation Assignment

ABF is seeking the services of a research and evaluation team to develop the evaluation methodology and survey tools as well as to perform the data collection, analysis, and evaluation based on the specifications described in this TOR. The methodology shall include an adequate mix of quantitative and qualitative methods and shall consider the use of control groups. The evaluation shall answer the questions listed in the Evaluation Objectives and Expected Results section while analyzing and explaining the findings.

The evaluation shall examine each of the three priority areas - Early Childhood Development, Educational Achievement, and Economic Self-Sufficiency.

The evaluator shall review all TSA projects and grantees, but given their large number, we suggest focusing on:

- The four largest TSA-initiated projects
- The four grantees receiving the most overall funding
- Three-five grantees receiving repeat funding (i.e. two or three years in a row), randomly selected

For some of these programs, evaluations have already taken place. In such cases, the evaluator shall assess the methodology of previous evaluations (looking at what is qualitative versus quantitative) and if that methodology is sound, consider the findings from earlier evaluations to inform the final recommendations of this evaluation.



Four Largest TSA-initiated projects:

Springboard for School Readiness	The World Bank is conducting a randomized control trial impact evaluation of this project – the first findings are expected at the beginning of June.
Nurse Family Partnership Program	An externally commissioned readiness assessment has been conducted and is available for review. Alpha Research has also conducted a baseline survey, which is available for review. The project design also requires an external evaluation – the evaluator will be selected this winter/early spring, but the evaluation will not be immediately available given the project’s research launch.
Zone and Legalize Two Marginalized Neighborhoods	Alpha Research has conducted a baseline survey, which is available for review. This project is still in its initial stages, and any evaluation will need to focus on process rather than results at this point.
Equal Chance: Access to High School / High School Scholarship Fund.	The evaluator shall propose a methodology to assess this project, including potential comparison to a control group, and include findings in its final report.

Four Largest Grants/Grantees:

Center Amalipe: “Every Student will be a Winner”	An external evaluation has been conducted of this project and is available for review.
Arete Youth Foundation: “ROLES – Roma Opportunities for Leadership, Education, and Success.”	The evaluator shall propose a methodology to assess this project, including potential comparison to a control group, and include findings in its final report.
Land Source of Income Foundation: “Roma Income Generation and Integration”	The evaluator shall propose a methodology to assess this project, including potential comparison to a control group, and include findings in its final report.
Student Society for Development of Interethnic Dialogue: “Terni Zor/ Youth Power.”	The evaluator shall propose a methodology to assess this project, including potential



	comparison to a control group, and include findings in its final report.
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Three-Five Grantees that have received support for a project for 2+ consecutive years:

The evaluator should review the list of TSA-approved projects and select three-five grantees that have received support for 2+ consecutive years and review and analyze reported results for these projects. When selecting grants for review, a randomized selection methodology should be used.

5. Deliverables and Schedule

The selected evaluation team/entity shall work closely with ABF throughout the entire evaluation. Workflow and deliverables shall be proposed in three phases:

5.1 Planning Phase - Definition of methodological approach: As a key part of the proposal, the Respondent shall propose the most adequate methodology and survey tools for conducting the evaluation. During the planning phase, the selected entity shall work closely with ABF's Evaluation teams to fine tune the methodology and to make sure that it meets the evaluation objectives. During this phase the Respondent shall get access to more detailed project information in order to get a better understanding of TSA programs.

Deliverable: Detailed evaluation execution plan, including sources of data collection and methods of data verification.

5.2 Development Phase - Development and testing of data collection tools and questionnaires: During this phase, the selected entity shall develop draft questionnaires covering the main topics to survey and shall share them with ABF for approval. In addition, the evaluator shall fully elaborate all the tools and instruments that have been approved by ABF for applying in the evaluation process.

Deliverables: Fully developed evaluation tools and instruments approved by ABF;

5.3 Implementation Phase - Fieldwork: It is anticipated that fieldwork will be necessary for the large projects that still require an impact evaluation – including the following projects: Equal Chance Access to High School, Arete Youth Foundation, Land Source of Income Foundation, and SSDID. The selected entity shall organize the data collection in the field and shall arrange other events as required to get first-hand information. Depending on the type of instruments used for data collection and observation, ABF shall have the right to include its representatives in some of the activities.

Deliverables: Summary of the initial findings of the fieldwork.



5.4 Reporting Phase: Once the field work is over, the Respondent shall prepare a preliminary report of findings with draft recommendations to share with ABF. The report shall be in English and shall follow the structure outlined below:

- I. Executive Summary (3-6 pages, standard formatting)
- II. Organizational Background (TSA mission, amount of funding, organizational and program objectives (1-2 pages)
- III. Evaluation design and Methodology
 - 3.1 Purpose of the Evaluation
 - 3.2 Scope of the Evaluation
 - 3.3 Methodology used
- IV. Findings and Analysis
- V. Conclusions
- VI. Recommendations

ABF shall provide feedback on the content before the final report is produced.

- Deliverables:**
1. Draft Report to be reviewed and approved by ABF;
 2. Final Report

ABF shall work closely with the implementer in a collaborative manner during all phases of the evaluation process to make sure that it is exhaustive and productive. The evaluation organization shall be flexible to adapt its approaches if and as required by ABF.

5.5 Schedule

Planning Phase:	Two weeks
Development Phase:	Four weeks
Implementation Phase:	To be completed by end of June 2016
First Draft of the Report:	July 15, 2016
Final Report:	September 15, 2016

6. Required Qualifications

ABF is looking for a reputable research and evaluation team demonstrating the following qualifications:

- Significant experience in evaluation of the effectiveness and efficiency of foundations



- Significant experience in evaluation of programs in the area of early childhood development; educational achievement, and economic self-sufficiency.
- Strong knowledge in early childhood development, educational achievement of economically disadvantaged populations, and economic self-sufficiency of underprivileged communities;
- Knowledge of the issues of the economically disadvantaged population in Bulgaria (focus on the Roma);
- Established track record and demonstrated experience in sample design, devising qualitative and quantitative methodology and implementing social studies and impact evaluations;
- Ability to evaluate the effectiveness of the survey instruments and methodology, and to revise as needed to achieve the best results;
- Proven ability to plan, manage and execute complex projects, and to ensure high quality delivery of results;
- Ability to adapt to unexpected program needs and changing work requirements;
- High ethical standards and deep sense of integrity and commitment.

7. Logistics and Timing

7.1 RFP Schedule: The RFP process shall proceed according to the following anticipated schedule:

February 8, 2016	RFP Issued
February 15, 2016	Deadline for all questions and clarification inquiries, submitted via e-mail to itzankova@americaforbulgaria.org and ibossev@americaforbulgaria.org
February 19, 2016	Deadline for all answers to Respondents' questions
February 26, 2016	Proposals due, 6:00 PM Sofia time
March 2, 2016	Invitations for in-person interviews sent by ABF
March 15, 2016	Selection of implementer completed & notification sent

7.2 Instructions for Submission of Responses: All responses shall be sent by email to itzankova@americaforbulgaria.org and ibossev@americaforbulgaria.org no later than 6:00 pm on February 26, 2016. Parties interested in undertaking this assignment shall submit the following information **in English**:

7.2.1 Cover Letter

7.2.2 Description of the Suggested Evaluation Methodology: This is a core component of the proposal that each Respondents shall provide. The narrative shall justify the use of specific quantitative and qualitative methods and the approach the Respondent shall apply for achieving the objectives of the subject evaluation;



7.2.3 Statement of Qualifications of the Organization: All responses shall include a statement of qualifications, experience and description of the Respondent organization and its history in implementing projects related to school education (1 page max). Samples of relevant previous pieces of work, and contact list for tentative recommendations shall be included as well;

7.2.4 Staff Qualifications: All Respondents shall identify the individual(s) who will have primary responsibility in the evaluation and shall submit their CVs. We strongly suggest creating a team with a Bulgarian expert with knowledge of the issues of the economically disadvantaged population in Bulgaria (with focus on the Roma);

7.2.5 Cost Proposal in USD: The Respondent shall provide a cost proposal for the Required Services, which includes a list, by type and amount, of all fees, overhead charges, or reimbursable expenses, together with timeline and estimate of days, preferably broken down by the three phases outlined above. ABF is prepared to provide appropriate funding for the methodology proposed.

7.2.6 Conflict of interest: Should the Respondent have conflict of interest it shall be disclosed.

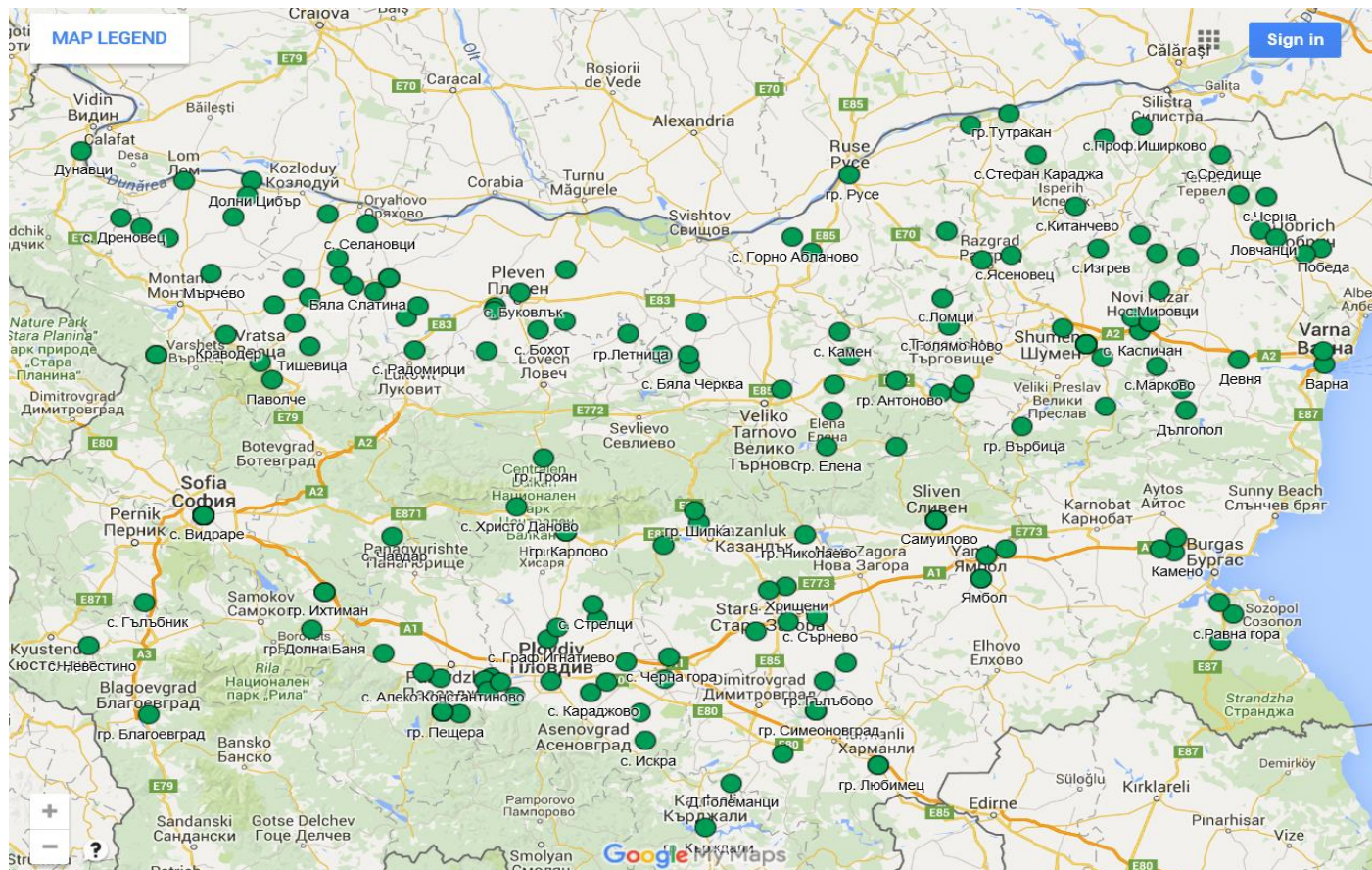
7.3 Evaluation Process, Criteria and Selection: ABF shall evaluate each response with timely and complete submission. After review of the responses, interviews might be requested.

Selection Criteria:

6. Adherence to solution requirements and appeal of proposed solutions;
7. Experience in design, implementation, and evaluation of educational, early childhood development, and economic programs;
8. Strong knowledge of education and employment sector structures, systems, and policies in Bulgaria;
9. Experience in sample design, devising qualitative and quantitative methodology and implementing social studies and impact evaluations;
10. Appeal of non-specified additions to improve quality of collected data and analysis.



Amalipe's Network of Schools, 2013-2015

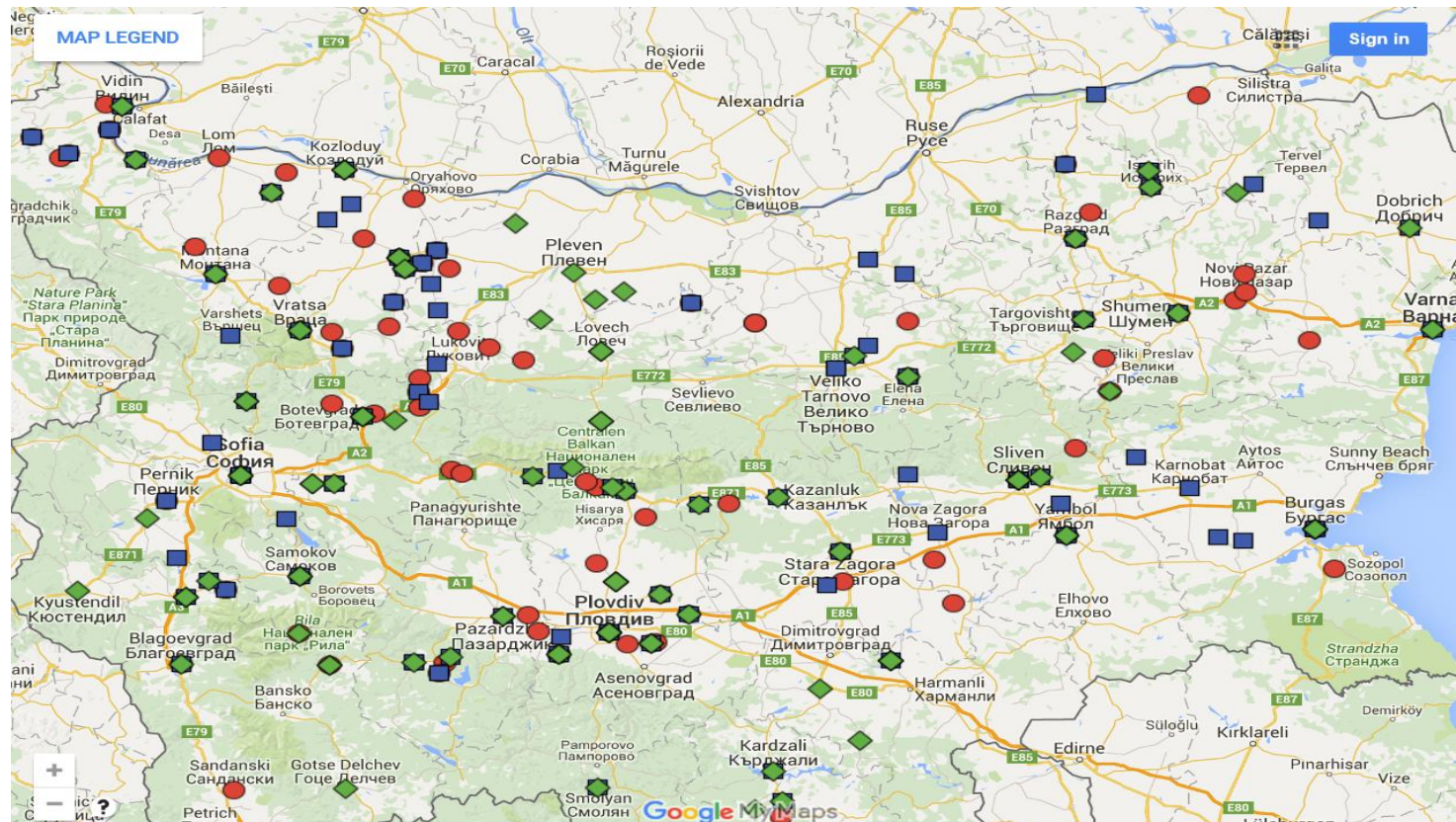




Equal Chance: School Locations, 2013-2016:

<https://www.google.com/maps/d/viewer?hl=en&hl=en&authuser=0&authuser=0&mid=zOyHvtN3PPyE.kMoX0IjRdHY>

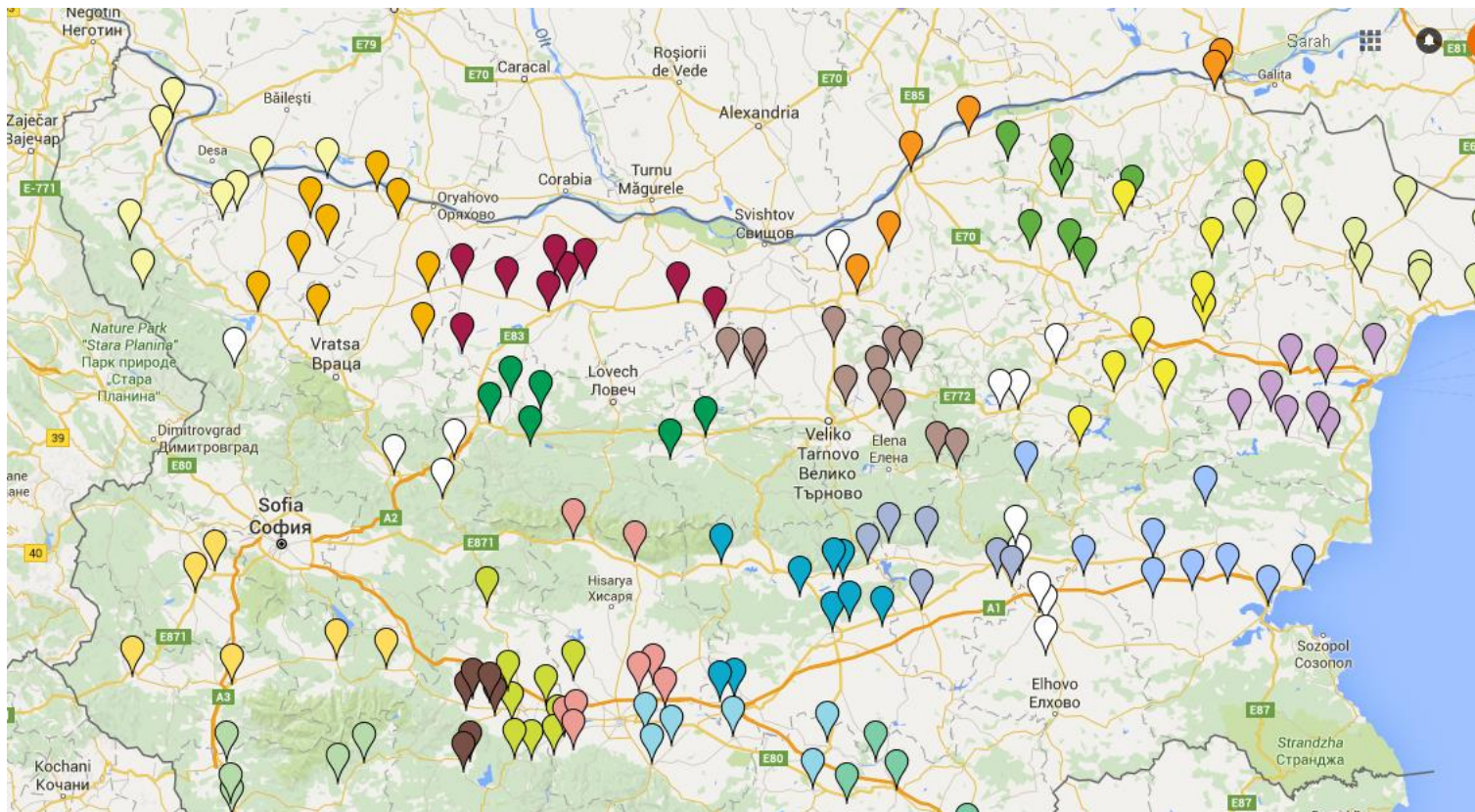
Legend: Red=2013-2014; Blue=2014-2015; Green=2015-2016





Springboard for School Readiness 2014-2015

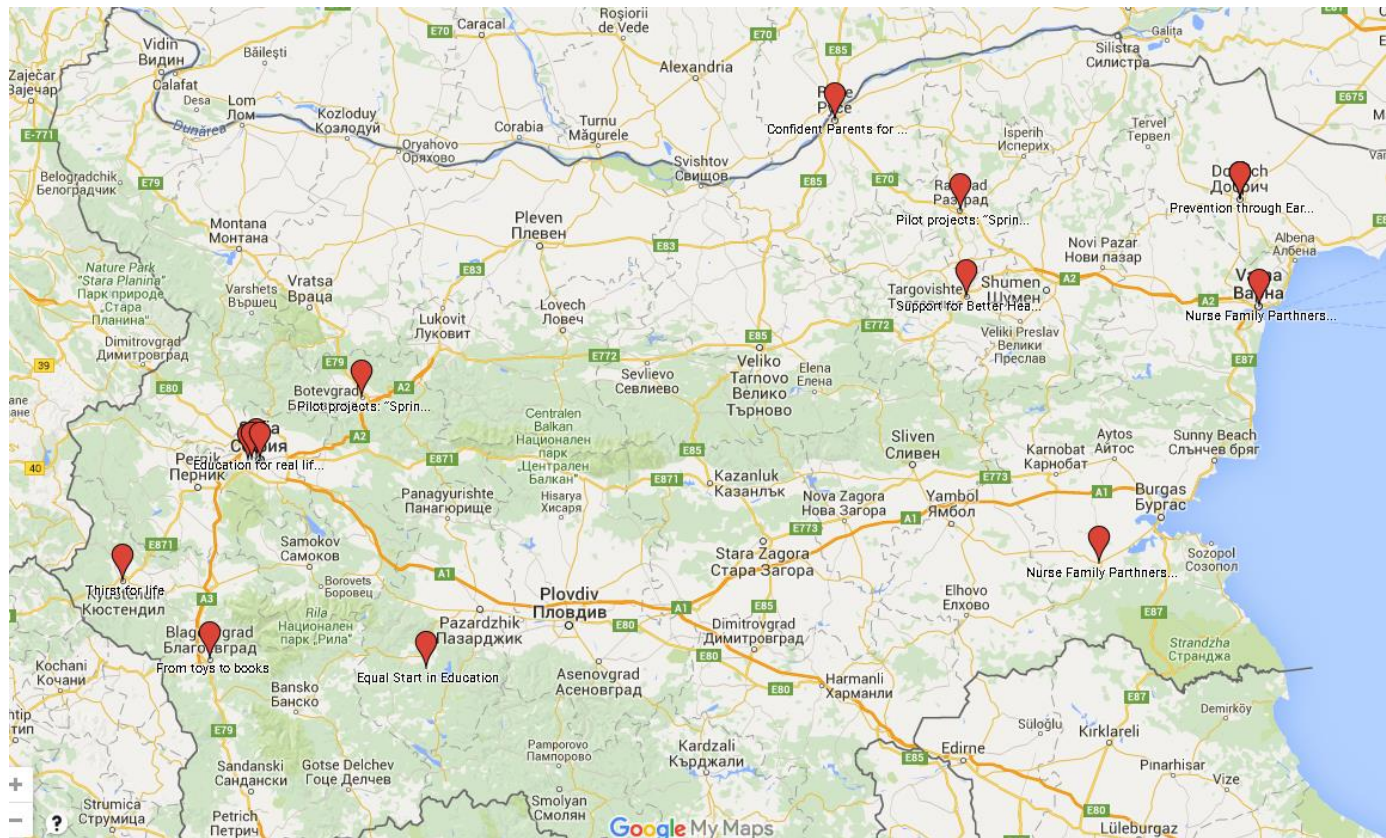
<https://www.google.bg/maps/@42.7564176,25.5260531,7z/data=!4m2!6m1!1szeywR-2QhP-M.kKaWBxjGExog?hl=en>





Early Childhood Development projects (not including the SSR project)

<https://www.google.com/maps/d/u/1/viewer?authuser=1&mid=zHfWcwG3omUc.kiuijmiHkpkE>





Educational Achievement program partners

<https://www.google.com/maps/d/viewer?hl=en&hl=en&authuser=0&authuser=0&mid=zOyHvtN3PPyE.k7cRCwnhZt8U>

