Annex I - Template for Specific technical offers

**FRAMEWORK CONTRACT EVA 2020**

EuropeAid/140122/DH/SER/Multi

**Request for Services OPSYS n° EVA-2020-[4 digit number provided by OPSYS]**

**Evaluation: [Evaluation title]**

**To be completed by the framework contractors as part of their offer.**

**Unless indicated otherwise in the Specific Terms of Reference maximum 15 pages in a reader-friendly[[1]](#footnote-1) format (The following do not count towards the number of pages limit: Annexes 1a and 1b, CVs and Statements of exclusivity and availability as well as Statements of confidentiality of the key experts of the evaluation team).**

**The CV of an expert must be maximum 5 pages long. The font size for the CVs must not be smaller than Times new roman font size 10 or Arial font size 9. CVs must clearly display the number of days[[2]](#footnote-2) relevant to assess the required experience.**

**Framework contractors may add annexes to their technical offer, but those should only be illustrative and not contain essential required information.**

*Framework contractors should make use of any information available in the Specific Terms of Reference, including when available the draft intervention logic and inventory information (list of projects and programmes interventions, evaluations and ROM reports) to design an offer that is specifically tailored for the assignment (including an appreciation of the requested service, an identification of risks and limitations with mitigating measures, evaluation tools to use).*

*Key expertise additional to the one required in ToRs part B can be proposed by framework contractors if it provides a clear benefit for the evaluation work. A detailed methodology (for example with at least 1 evaluation question fully developed with concrete judgement criteria and indicators, identified sources of available data, etc.) and a team of experts that is consistent and that is responding to all requirements is an essential part of the award criteria.*

# Rationale

* *Any comments to the Terms of reference demonstrating the degree of understanding of the purpose and scope of the specific assignment, in particular:*
* *a deeper analysis of the intervention logic (intended);*
* *a further assessment of the context and the challenges foreseen to be addressed in the EQs/criteria (including mitigation measures to be part of the Strategy).*
* *Identification and explanation of the risks affecting the execution of the Specific assignment.*

# Strategy, including Organisation & Methodology

* *Description of the methodology for producing robust evidence and conclusions; adaptations or additions to the INTPA evaluation approach and methodology; and any ethical considerations including gaining informed consent, managing gender and/or power dynamics, and protecting the privacy and confidentiality of participants.*
* *The proposed methodological approach should be specific and detailed, suitable for extracting the data/info needed to address the EQs and assess/reconstruct the realized intervention logic throughout the evaluation phases. Bidders should not shy away from proposing innovative approaches.*
* *Description of the distribution and interaction of tasks and responsibilities between members of the consortium. If relevant, also a description of any subcontracting arrangements with a clear indication of the tasks that will be entrusted to subcontractors and a statement by the tenderer guaranteeing the eligibility of subcontractors.*
* *Description of the quality assurance and quality control operations and responsibilities which will be ensured all throughout the assignment, including ensuring methodological integrity and responsible management of data;*
* *A timetable of activities, presenting the indicative timeline per phase, activity, and deliverable.*

*The contractor shall include at least the following kind of table, hereafter presented as an example, dully filled-in and to be adapted based on the provisions of the specific terms of reference:*

|  |  |  |  |
| --- | --- | --- | --- |
| *Evaluation Phases and Stages* | *Deliverables* | *Dates* | *Meetings/Communications* |
| Inception phase |  |  | Kick-off meeting in Brussels  |
|  | Draft Inception report + Slide presentation |  |  |
|  |  |  | Reference Group (RG) or Interservice Steering Group (ISG) Meeting |
|  | Final Inception report |  |  |
| Interim / Desk phase | Draft Desk report + Slide presentation |  |  |
|  |  |  | RG/ISG Meeting |
|  | Final Desk report  |  |  |
| Field stage |  |  | De-briefing meeting with the Delegation |
|  | Field mission notes + Slide presentation |  |  |
|  |  |  | RG/ISG Meeting |
| Synthesis phase (seminar in the country/region)  |  |  |  |
|  | 1st Draft final report + Slide presentation |  |  |
|  |  |  | RG/ISG Meeting |
|  | 2nd Draft final report |  |  |
|  |  |  | Seminar in **[country]***or, in principle, in* Brussels *for regional/thematic evaluations* |
|  | Final report + other deliverables (including executive summary) |  |  |

* *Proposed work plan, presenting the indicative allocation of expert resources per phase & activity.*
* *Proposed Communication plan:*
* *Methodology and approach in presenting results (format/design for the documents, visuals, or additional media to present and disseminate the main findings – be creative! e.g. video, cartoon, etc.).*
* *Examples (including from previous contractor experience in similar duties) of the proposed supports for presenting, communicating, and disseminating the findings. If required, provide a mock example.*
* *If required in the Specific ToRs, reflect communication requirements in the composition of the evaluation team (i.e. communication expertise covered) and in the proposed allocation of resources (time and budget allocated to communication activities).*
* *Description of the qualitative and technical support that the team of experts will receive from the Framework Contractor’s own staff and office(s) during the execution of the specific assignments, both from the technical point of view (management of internet public consultations, management of on-line surveys, access to documentation, etc.) and the logistics (flights, accommodation arrangements, interviews, etc.).*
* *Please fill the attached forms on:*

*- Annex 1a: Type of Experts and Consortium member(s) responsible for their quality supervision;*

*- Annex 1b: Backstopping function / quality supervision within the responsible Consortium member;*

# Presentation of the Evaluation Team, including capacities and roles

* *Describe the key capacities (including languages and crosscutting expertise such as gender) of the team of proposed experts, as well as the expected roles needed for implementing the proposed strategy.*
* *Describe the distribution of tasks and responsibilities, and the expected interactions and synergies between experts.*
* *CVs of in-house (permanent) and external experts proposed (with statements of availability and exclusivity, as well as statements of confidentiality: see template at the end of this section).*

**Annex 1a: Type of Experts and Consortium members responsible for their quality supervision**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Name of expert (and category, choose among senior, medium, junior) | If he/she is a permanent expert, specify whether Employee or shareholder[[3]](#footnote-3) ? | If permanent, then from which member of the consortium? | If status is "Not permanent", specify whether freelance or other? | In case the expert is provided by a local partner or subcontractor, please indicate name and nationality | If the expert is not part of the core team of the FWC, specify which member of the consortium is responsible for the supervision/quality of his/her work |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
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**Annex 1b: Backstopping function / quality supervision within the responsible Consortium member**

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| Member of the consortium which retains implementation/quality responsibility over this specific assignment | Backstopping functions  | Department in charge | Name of the expert  | Actual title in the company | Diploma | Years in the current position/department | Years of relevant experience |
|  | Supervising function |  |  |  |  |  |  |
| Supervising function (second or substitute)[[4]](#footnote-4) |  |  |  |  |  |  |

**DECLARATION OF** **CONFIDENTIALITY**

**(to be filled in and signed for each key expert part of the evaluation team)**

**Request for Service N° EVA-2020-[4 digit number provided by OPSYS]**

**[Evaluation Title]**

In application of Article 7.6. of the General Conditions of the Framework Contract EuropeAid/140122/DH/SER/MULTI signed between the European Commission and [Framework contractor (i.e. leader of the consortium) name],

I, the undersigned, shall maintain the strictest confidentiality in respect of all information acquired because of my involvement in the work of the above-mentioned evaluation, as well as any information relating specifically to the object of this evaluation.

I undertake neither to disclose such information to any person not already authorized to have access to such information, nor to discuss it with anyone, in any public place, or in any place where others could overhear it.

I undertake to use this information only in the context and for the purposes of the work of this specific evaluation.

In case personal data are disclosed to me, or become available to me in any other way in the context of this evaluation work, I also undertake to comply with data protection principles specified in Article 42 of the above-mentioned Framework Contract.

After the conclusion of the evaluation contract, I undertake not to retain copies of any written or recorded information used in the course of my duties.

I understand that any unauthorized disclosure by me will result in the termination of my role as a member of the evaluation team and may render me liable to legal action.

I undertake to maintain this duty of confidentiality after the conclusion of my term as an expert involved in this evaluation work.

|  |  |
| --- | --- |
| **Name** |  |
| **Signed** |  |
| **Date** |  |

1. Times new roman font size 12 or Arial font size 11 are both accepted. [↑](#footnote-ref-1)
2. CVs must display the start and end date of each relevant professional experience as well as the actual corresponding number of working days expressed in full time equivalent (FTE). This is mandatory information as it allows for a fair assessment of the experts. [↑](#footnote-ref-2)
3. Shareholder, owner, corporate partner, cooperative member [↑](#footnote-ref-3)
4. If relevant for this specific contract to have a second department associated, or a second person to ensure continuity [↑](#footnote-ref-4)