08

**Fall**

**Client**

EAPN Europe

#

**Proposal**

External evaluation of EAPN

**Date**

23 of Jannuary 2014

# Rational

The EAPN wants to appoint an external evaluator who will assess the current functioning of the Network, the relevance of its structures as well as the work content and the involvement of its members. This work will be undertaken in a challenging external environment: while one of the headline targets of the EU 2020 Strategy is *to reduce the number of people in or at risk of poverty and social exclusion by at least 20 million,* social exclusion is increasing across Europe – including severe forms of poverty.

The work of the external evaluator will be a central part of the process of evaluating the current Strategic Plan; the EAPN is currently in the process of evaluating the present Strategic Plan (2012-2014) and preparing the next one (2015-2018). This process was launched in November 2013; in early spring 2014, an intensive internal evaluation should have advanced in order to circulate the next Strategic Plan in May and to approve it in the next General Assembly in June 2014.

The evaluation should asses, whether the goals of the current Strategic Plan remain effective in the future, how effective the working methods are, what other changes, in terms of structures and content, should be put in place and, particularly, how effective member engagement with the goals of the European network is. It is expected that the external evaluator will provide external input to EAPN on how to build a stronger and more resilient network with active and dynamic member engagement, including people experiencing poverty. According to discussions with the Bureau, the external evaluator should assess:

1. *if the statutory and working structures are adequate and effective in the current reality of EAPN (Exco and the General Assembly responsibilities; EUISG and Exco cooperation, Task Forces);*
2. *if the policy objectives and structures for engaging with them are the right ones and what the impact of EAPN lobbying and advocacy work at EU and national level is;*
3. *how to develop strong national networks and organise capacity building for members, given the new conditions;*
4. *how to fundraise and ensure that solidarity funding contributes to stronger members who engage better with EAPN;*
5. *how to continue to strengthen direct participation of people experiencing poverty inside EAPN and in its external work;*

# Objectives

Following the discussion paper prepared for the Executive Committee and the demand received by the evaluator, the external assessment will cover both **strategic and operational levels and will build among them**.

* The strategic level will look at the degree of consistency between the current EAPN activities and the challenges faced in the future.
* The operational level will look at the degree of efficiency of the current working methods, groups, roles of the different bodies, etc., as regards to the objectives identified in the strategic Plan (2012-2014) and expected results.

The external evaluation will be based on the current situation (diagnostic approach) but focus on the future challenges (prospective approach). The proposals will have to be guided by the drivers of results-orientation by taking into account EAPN resources and capabilities.

The evaluation will be focused on three major objectives; for each of the objectives potential improvements for the future will be presented:

1. **The contents:** To assess if the goals and objectives approved in the EAPN Strategic Plan (2012 – 2014) continue to be adequate for the coming years and to what extend they:
	1. Need to be changed by delaying some of them and introducing new ones.
	2. Need to be adjusted in the way they are presented.
	3. Need to be prioritised according to the EAPN mission and in accordance with the EAPN capacities and resources for the coming years.
2. **The organisational structure:** To assess the suitability of the current working structures and its functioning (*Exco and the General Assembly, Task Forces, EUISG, role of the secretariat, etc.)* according to the challenges that the EAPN face in the coming years; special attention will be paid to:
	1. Their consistency with the objectives and priorities for the future of the EAPN.
	2. The alignment between the overall activities of the EAPN.
	3. The potential overlapping among them and adequate cooperation and synergies.
3. **The working methods**: To assess to what extend the current working methods of the EAPN, including organisational procedures are adequate and efficient enough; special attention will be paid to:
	1. The adequate balance between participation and efficiency.
	2. The engagement of the national networks and the people experiencing poverty.
	3. The capacity to integrate the existing diversity in the EAPN and to align forces towards the same objectives.
	4. The extent to which working methods follow a results-based approach.
	5. The capacity to foster mutual learning and mutual support among national EAPNs and among organisations.
	6. The capacity to influence EU policies on anti-poverty and social inclusion issues.

For each of the aforementioned objectives the following documents will be produced:

* Diagnostic analysis of the current situation
* Orientations and proposals for the future.

# Working Method

The proposed working method has been coincided taking into account the limited time to develop this work and according to the available resources. We propose **three simultaneous complementary methods**:

* A questionnaire to be send to the national networks and to the European organisations
* Several in-depth interviews with key contact persons complemented by a discussion group to be held with the EAPN Secretariat.
* Analysis of secondary sources provided by the EAPN during the process.
1. **Questionnaire:**
* Target audience: The questionnaire will be sent to the national networks (29) and to the European organisation (18).
* Aim:The questionnaire aims to get the views and opinions of the national organisations and the European organisations by giving the external assessment a participatory dimension.
* Structure: The structure of the questionnaire will follow the structure of the three aforementioned objectives (contents, organisational structure and working methods), and take into account the objectives of the Strategic Plan 2012-2014, the guiding questions for the orientation debate (Executive Committee Meeting) the concept note prepared by the evaluator as well as other documents provided by the EAPN.
* Process: The consultant will prepare a draft to be discussed with the EAPN Directorate. In order to encourage the respondents to answers, the questionnaire will be sent by the Bureau, accompanied by a letter encouraging answers. Respondents will answer directly to the consultant.
* Timing:The questionnaire should be drafted and ready to be sent by 4 February 2014. In order to facilitate answers, national networks will have until 21 February for answering. A reminder will be sent by the EAPN to those that did not answer; additional answers will be considered if they arrive until 28 February.
* Languages:The questionnaire will be in English**.** Answers may be in English, French, German, Italian, Spanish and Portuguese.
1. **In depth interviews and discussion group:**
* Target audience: We propose to hold six in-depth interviews and one discussion group:
	+ Interviews: The current president, the former director, the current director, one representative from the European Commission (to be identified by the EAPN), one representative from the European Parliament (to be identified by the EAPN), one representative from a peer organization (to be identified by the EAPN)
	+ Discussion group: The discussion group will be held with the EAPN Secretariat and will focus on their views about the three aforementioned objectives as well as their perception about the internal and external effectiveness of their role.
* Aim:The in-depth interviews and the discussion group aim to collect the views and opinions from key contacts, including current and former representatives, the staff and also an external regard from key stakeholders.
* Structure: Prior to the interviews, the interviewees as well as EAPN staff will receive a list of questions to be addressed.
* Process: The consultant will prepare a draft to be discussed with the EAPN Directorate. EAPN will pre-contact the people to be interviewed as well as make the necessary arrangements for the discussion group.
* Timing:In-depth interviews will last one hour each and will be conducted in person or by telephone/skype. The discussion group will last two hours. The interviews and discussion group will be developed between 4 February and 28 of February 2014.
* Languages:The interviews and the focus group will be developed in English.
1. **An analysis of secondary sources**
* Aim:Secondary sources provided by the EAPNduring the entire process will be very important in order to prepare the questionnaires and interviews as well as supporting documents while drafting the report and proposals.

**Discussion of the draft report and presentation of final report:**

The initial draft assessment will be produced according to the previously described working methods and will be considered as a draft for internal discussion. It will serve as a base for discussion during the March Executive Committee in Warsaw and will be finalised by including feedback and comments from:

* EAPN Bureau
* EAPN Executive Committee
* EAPN Direction

# Deliverables

As a result of the external evaluation the following products will be delivered:

**Working materials:**

* Questionnaire
* Guide for the in depth interviews and the discussion group
* Draft report
* Power Point presentation of the Draft Report

**Final Deliverables:**

* Final report

# Time Frame

|  | **2014** |
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| **Action** | **January** | **February** | **March** | **April** |
| **Phase 1: Adjustment of the proposal and preparation of the working tools** |
| Discussion of the proposal and final agreement | Week 3 |  |  |  |
| Analysis of relevant documentation (information) | Week 3-4 |  |  |  |
| Preparation of the questionnaire | Week 4 |  |  |  |
| Sending the questionnaire to the national networks |  | 4 Feb |  |  |
| **Phase 2: Field work and draft report** |
| In-depth interviews | 4 Feb - 28 Feb |  |  |
| Discussion group | 4 Feb - 28 Feb |  |  |
| Deadline for receiving questionnaires |  | 21 Feb (28 Feb) |  |  |
| Analysis of the answers to the questionnaire |  | 21 Feb – 3 March |  |
| Draft report |  |  | 12 March |  |
| **Phase 3: Discussion of the draft report and final report** |
| Meeting in Warsaw |  |  | 14-15 March |  |
| Second draft report |  |  | 24 March |  |
| Comments to second draft report |  |  | 31 March |  |
| Final report |  |  |  | 4 April |

# Budget

The total price is estimated at 10.000 Euros, free of duties, taxes and other charges.

This price is estimated on the basis of 25 working days and includes expenditures such as telephone costs and working materials. It does not include travels; in principle, there are two travels foreseen: one Madrid - Brussels and the other Madrid – Warsaw. The first trip includes two persons and the second trip one person.

# Conditions of the service

Fresno the Right Link will perform technical assistance services with specialised staff necessary to ensure their quality and the best results.

The work will be led by José Manuel Fresno, director of Fresno the Right Link, and developed with the support of Alia Chahin and Cornelia Rauchberger.

EAPN Europe shall provide the consultancy company with documentation, contacts and data necessary to carry out the technical assistance. Furthermore, EAPN Europe will facilitate the organisation of meetings and interviews.

Fresno the Right Link guarantees at all times the confidentiality of the data and information provided by EAPN Europe and will only make use of them to meet the objectives of the assignment.

Through its usual communication channels, Fresno the Right Link may advertise that EAPN Europe is one of its customers.

EAPN Europe will appoint a responsible contact person for the development of strategic assessment, who, when necessary, will incorporate others into the working process. At all times, the smooth coordination by both parties is ensured.

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| For more information about the company and our team:<http://www.fresnoconsulting.es/>  |