



TERMS OF REFERENCE

Conducting baseline report for the Convenio
**Economic strengthening and social stability of vulnerable local
and displaced communities in South Lebanon**

2023 February

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1. Introduction

Fundación Promoción Social (FPS) together with the Spanish NGO AIDA (Ayuda, Intercambio y Desarrollo) and their local partner Association for the Development of Rural Capacities (ADR) will implement the Convenio called **“Economic strengthening and social stability of vulnerable local and displaced communities in South Lebanon”**.

During the identification phase of the Convenio, prior to the presentation of the proposal in May 2022, rights holders, public entities, associations and other private institutos participated through interviews and meeting, which made it possible to obtain information on the different problems, violated rights and possible solutions in the target communities. The analysis of this situation, thanks mainly to the high motivation of the members of the communities, allowed the definition of a proposal that seeks to reduce the vulnerability faced by the population of the South region of Lebanon (especially women and young people) and that has escalated due to the successive crises suffered in the country affecting their livelihoods. The combined actions of the CONVENIO will address in an integral way the strengthening of technical capacities and the support to productive enterprises, aimed at achieving changes in the lives of people and the strengthening of the resilience of the population as well as the social stability. The proposal has been identified based on the participation spaces and consultation mechanisms established in the projects implemented in the sector, as well as the extensive presence of ADR in the intervention area.

The participation of the population has made it possible to improve the focus of the Convenio's training programs and adapt them to their needs, with a greater offer of vocational training and other skills in sustainable business entrepreneurship; the financial inclusion of vulnerable Lebanese women or the implementation of a local network of entrepreneurs from the Lebanese population to make them visible and improve the business management skills. A greater commitment to entrepreneurship will have a greater impact on the autonomy and economic empowerment of women. Another focus of the Convenio will be to strengthen social cohesion between the vulnerable local Lebanese and Syrian displaced population in the South Lebanon region, generating an enabling environment for inclusive and sustainable development.

Thanks to a participatory process to carry out the identification, the Convenio submitted to AECID led to a log frame that includes the vertical logic of the intervention and the indicators envisaged to ensure the correct monitoring and achievement of the results and objectives. The purpose of this baseline is to validate this framework of objectives and results, whose timespan is 48 months (from April 1, 2023 to March 31, 2027) and to assess the situation at the beginning of the intervention. This requires collecting relevant and significant information, at both a quantitatively a qualitative level.

The baseline study will be carried out through an external consultancy, which will play a facilitating role in strategic and operational reflection processes, fostering debate regarding access to rights contemplated by the three specific goals of the Convenio.

PROJECT TITLE	Economic strengthening and social stability of vulnerable local and displaced communities in South Lebanon
APPLICANT ONGD	Fundación Promoción Social
GROUPED ONGD	ONG AIDA
EXECUTING PARTNERS IN THE FIELD	Association for the Development of Rural Capacities (ADR)
COUNTRY	South Region. Lebanon
PROJECT DURATION	2023 April -2027 March
FUNDERS	AECID, FPS, AIDA, ADR
GOALS	<p>General Goal: Contributing to the right to an adequate, sustainable and gender-sensitive standard of living for vulnerable Lebanese and displaced Syrian communities in South Lebanon in a context of social stability.</p> <p>Specific goals:</p> <p>Promote the socio-economic and sustainable empowerment of women and youth (vulnerable Lebanese and displaced Syrian population) in South Lebanon. (SG1)</p> <p>Strengthen social cohesion between the vulnerable local Lebanese and Syrian displaced population in the South Lebanon region, generating an enabling environment for inclusive and sustainable development. (SG2)</p>

2. Objectives of the baseline study

2.1 Main objective

The main objective of the baseline study is to establish and define the parameters of comparison of the initial situation that the Convenio seeks to change to later identify and explain the impact and achievement of the goals set in the intervention.

2.2 Specific objectives

It is essential to have the maximum level of detail of the previous situation and, to achieve this end, the following specific objectives become especially relevant:

- Analyse and review the theory of change of the Convenio, its logical framework objectives, results and actions.
- Analyze and review the Convenio's indicators in line with the logical framework as they were designed in the formulation phase to guarantee its evaluability.
- Perform a methodological review of the indicators to attend the SMART¹ parameters (SMART): specific, measurable, agreed, relevant and time-bound, as well as their corresponding sources of verification chosen.
- Take first measurement of all agreed indicators (baseline) as long as setting realistic and logical intermediate and final targets for each indicator.
- Define and design standardized techniques and instruments to ensure that the necessary information on key indicators is obtained for planning, monitoring, evaluation, control and accountability. Specific focus on data collection tools; timeline for data collection; roles and responsibilities
- Organize a database according to the identified sources of information and support the development of a ToR to recruit a coding company to make a digital database, as planned in the original convenio design.
- Design a system to ensure routine internal monitoring of and reporting on activities, including simple formats for routine reporting.
- Investigate the framework and context of small business in the South Region with a main focus on challenges and opportunities linked to employment and entrepreneurship (SMEs) in the sector.

¹ SMART parameters:

- Specific: reflecting the changes that the project wants to introduce, without ambiguity and avoiding measuring variations that are due to other influences (external factors). It is always useful to clearly specify the target group and location in the indicator statement.
- Measurable: with the certainty that the necessary information can be obtained with existing means.
- Agreed or consensual by all involved.
- Relevant to the immediate objective to which they are linked, so that the effort to obtain the information is not wasted.
- Temporal with respect to the period of execution of the Convenio.

3. Background and justification

With an HDI of 0.730 (UNDP 2019) Lebanon is going through an unprecedented multidimensional crisis. The depreciation of the pound by more than 90% in 2021 has triggered inflation (138%), with a severe deterioration of purchasing power: in 2021, more than 50% of the Lebanese population was living below the poverty line (poverty rate in the South region: 75%) and 9 out of 10 displaced Syrian households were living in extreme poverty, with a 557% increase in the average price of the food basket. The energy deficit has exponentially exacerbated this situation.

Since October 2019, 1 in 5 Lebanese workers have lost their jobs and 61% of formal companies reduced the number of jobs by 43%. The Tyre Region, with 35.4% of its population under 18, suffers from unprecedented youth unemployment. Unemployment among displaced Syrian women (42%) is almost double that of men (27%). The economic vulnerability of women and girls is reflected in the fact that female-headed households spend more than 75% of their income on food, while almost 3/4 of unemployed women do not work due to caregiving responsibilities.

The last 3 years have seen a worsening of the negative relations between the Lebanese and Syrian displaced communities, with the main factors of tension being access to cash (75%) and competition for low-skilled jobs. This deterioration has been exacerbated by an increase in hate speech and tensions including stigmatization, misinformation and violence against women and girls. Municipalities play an important role in responding to the needs of their communities, solving problems of social stability, ensuring safety nets. The Union of Municipalities of Tiro has a network of URRs in 30 of the 60 communities, which through awareness-raising and work at the local level contribute to reducing tensions and promoting a culture of peace.

Political instability in Lebanon makes it difficult to implement national development policies. The combination of economic crisis and inflation has generated model changes such as the labor market, with effects that have weakened the population's access to an adequate right to life, reducing the purchasing power of the most vulnerable to mere subsistence levels. The CONVENIO will address the double problem of this disruption suffered in the economic and social stability of Lebanon, working on two large components: promotion of the economic strengthening of the Lebanese and displaced Syrian population (SO1) and promotion of social cohesion between both communities, reinforcing the Duty Bearers (DB), Responsibility Bearers (RB) and Right Holders (RH) capacities with special emphasis on gender and environmental issues (SO2).

The Convenio wants to face the lack of opportunities for vocational training, that allows women and youth to access the labor market with greater guarantees, which not only has an impact at the individual level, but also at the household level. Promoting access to economic resources will reduce the opportunity gap for women to access the labour market, and therefore to economic Independence. will have an impact at the community level with the creation of enterprises, which will contribute to strengthening women's access, with specific interventions both individually and collectively through work with women's production groups, helping to reduce this labour market gap. The planned work in the context of systematized meetings between entrepreneurs, has a greater effect of transmitting knowledge at the community level, forming working groups by sector of activity that will have an impact at a higher level than the individual.

Strengthened infrastructures in an area so affected by unemployment will reduce community vulnerability to the effects of energy and economy crises of the country.

An impact is expected at the local institutional level, through the Rapid Response Units (SDG16) and its relevance in the construction of an adequate model aimed at reducing risk and social cohesion. The development of capacities of its members and their promotion through the public awareness, will have a triple mission: reinforce its institutional role, grow in terms of resources, and favour an adequate environment that allows the socioeconomic development of the population. To scale the impact, this model implies reinforcing skills and capacities of both the Response Units (Duty Bearers) and the local partner (RH) due to their proximity to rural communities and their relationship maintained over time with them, in a manner that, through the efficient fulfillment of their mandate, they contribute to reducing social tension in a sustainable way and adequately applying gender mainstreaming in their actions.

4. Scope

The Baseline study will have as a reference the socio-economic problems of the South Region and, specifically the 4 cazas where the activities of the specific objective 1 will be implemented: Tyre, Nabatieh, Bint Jbeil & Marjeyoun.

The dimensions to be analyzed in this study are marked by the specific goals (yet described) that the intervention wishes to achieve and by the specific results to be reached (the acquisition of technical and professional competencies and skills in sustainable business; the financial inclusion of vulnerable populations; access to self-employment and the start-up of small businesses; the implementation of a local network of entrepreneurs; capacity building of Duty Bearers and Right Holders for their contribution to the maintenance of social cars; and the promotion of knowledge of their rights to improve resilience to social, economic and environmental disasters).

In this way, the Baseline will pay special attention to the social, economic, and organizational dimensions of the target population and will take into account the indicators designed in the project planning matrix that will be provided to the consultant team.

5. Desk review resources and Participants

The consultant will rely mainly on available resources linked to relevant target groups of the Convenio associated with both internally/externally evaluated projects with similar activities and target audiences of the convenio; implemented recently by the local partner.

The actors that will participate in the Baseline study are:

- ADR, AIDA & FPS teams
- Associations and cooperatives in the field.
- Local authorities
- Local experts in the field of entrepreneurship (experts must be nominated by the tendering consultant as part of the technical proposal to be submitted)

In the field, the ADR technical team will work in close coordination with the consulting team or person, assuming a facilitating role. FPS staff will assume a follow-up, dialogue, and monitoring role in all the phases of the preparation of the Baseline to ensure the proper management and development of this first stage of the Convenio, providing all the necessary documentation for the desk work. In the same way, AECID, especially its office in Jordan and the Spanish Embassy in Lebanon, will provide close support, participating in the whole process for joint decision making.

The team or consultant will be responsible for the design of the necessary tools to carry out the data collection, processing, analysis and safeguarding.

6. Conceptual framework and technical approach in the design of the Baseline

The Baseline offers a set of evidence and insights of the initial situation of the Convenio, as well as the context in which it intervenes, so that this information can be compared with the changes achieved in subsequent analyses. As a theoretical framework, the following documents will be considered:

1. Convenio formulation: application.
2. Logical framework matrix.
3. Evaluation and reports on the last projects executed between ADR, AIDA & FPS.

7. Methodological approach

The baseline should take into account the following methodological considerations for its design and execution:

- Define the scope in order to elaborate a consistent matrix between the Logical Framework and the Project Baseline, which allows corroborating the data obtained in the diagnosis.
- Identify the different sources of information, both primary and secondary, in order to develop instruments and participatory methods for its collection, as well as to triangulate the information in order to have a greater rigor in the collection of information.
- Obtain updated information on the target population of the project intervention, its actors and beneficiaries. Qualitative (interviews, focus groups) and quantitative (surveys) methods of information gathering will be applied.

7.1. Deliverable products

As an integral part of conducting the Baseline study, the consulting team will deliver, in English, according to the established deadlines (see section 9), the following documents:

1. **Methodological proposal for the elaboration of the baseline**, which shall include the following:

- a. Identification of the different sources of primary and secondary information.
 - b. Development of methods for data collection with the participation of key stakeholders.
 - c. Description of tools for the triangulations of the information collected and analyzed.
 - d. Description of qualitative and quantitative methods for obtaining information and carrying out indicators.
 - e. Description of the instrument for measuring and monitoring the evolution of the baseline indicators.
2. **Preliminary report of the baseline**, which shall include the following:
- a. Description of the methodology used to collect data in the field.
 - b. Description of the activities carried out in relation to the logistical planning of the data collection, the preparation of questionnaires and the fulfilment of the same.
 - c. Description of the information areas that the questionnaires will collect.
3. **Baseline report**, which shall include the following:
- a. Executive summary
 - b. Presentation of the consultancy team, description of the objectives set in the baseline study and workplan followed.
 - c. Performed activities and description of the technical methods used to collect information and the analysis methods.
 - d. Conclusions derived from the analysis.
 - e. Review of the project logical framework matrix (goals and results) and assessment of the evaluability (indicators).
 - f. Database in Excel format, with a defined structure of records that include quantitative and qualitative results obtained from data collection in the field.
 - g. Conclusions, recommendations.
 - h. Include all backup files of the information collected in the field phase.
4. **Monitoring Plan**
- a. Expected results: obtained from the project planning matrix.
 - b. The indicators of the results framework, including the measurement indicators established in the baseline.

- c. Goals, understood as the expected level of achievement for a result in the period over which it will be carried out.
- d. The tools and activities that will be used to collect data in relation to each identified indicator and goal (surveys, questionnaires, meeting with stakeholders, etc.)
- e. The time and frequency of the information gathering tools and activities will be applied.
- f. The identification of the actors involved in each of the monitoring activities.
- g. The estimate of the resources necessary and committed to carry out the follow-up activities.
- h. An estimate of the risks that we forecast that must be taken into account to ensure the achievement of the results in the follow-up period.

8. Phases of the baseline

The baseline study will be carried out in the following phases

1. Initial phase / Methodological proposal
 - Establishment of meetings between the technical staff of the project (ADR, AIDA and FPS) and the consulting team.
 - Gathering and review of the available information.
 - Preparation of the methodology.
2. Field phase
 - The consulting team will travel to the target locations where the project will be implemented to collect the necessary data for the preparation of the baseline.
 - Collection of secondary data, conducting questionnaires, sampling, interviews, surveys, conducting focus groups.
3. Preparation phase
 - Data analysis, preparation and discussion with the technical staff of the project (ADR, AIDA and FPS) of the draft of the baseline report.
 - Preparation of the final report of the baseline.

The offer should include an update of the baseline to the year of implementation when the first selected participants will be available for interview. A baseline report is expected to be delivered reviewing the indicators, objectives and results adapted to the final report.

9. Timetable

The proposed number of working weeks to complete all the above-mentioned tasks is 7 working weeks carried out within a period of two months only. This period will be preceded by 2 weeks of contract signing and work organization. The different phases in which the baseline will be carried out will be divided temporally according to the following schedule.

Activity / weeks	2023 March				2023 April				2023 May
	1	2	3	4	5	6	7	8	9
PHASE 0 - Organization of the work and signing of the contract.									
			X	X					
PHASE 1									
Information review				X	X				
Meetings of technical and consulting staff.				X	X				
Elaboration of the methodology and delivery of the methodological proposal				X					
PHASE 2									
Gathering of information in the field and/or secondary sources within the scope of the project.				X	X	X			
PHASE 3									
Data processing.						X			
Information analysis.						X			
Delivery of the preliminary report and discussion of results with the project manager.						X	X		
Conclusions and recommendations for the elaboration of the Follow-up Plan and its matrix							X	X	
Delivery of the final Baseline Report with baseline data, intermediate targets and final targets.									X

10. Budget

The prices provided in the quotation will not exceed 10.000 euros (taxes included), according to the estimated budget of the Convenio include the cost of baseline update in one year.

Prices provided will abide the awarded consultant for that it guarantees smooth delivery of the requested services. This included but not limited to all delivery of services, coordination and other logistic costs, as travels ones. The evolution of the exchange rate (if any) will not be a reason to modify the prices of the initial quotation.

All payments will be carried out in EURO bank transfer to the consultants. FPS will pay the amount in 2 installments.

1. 50% upon contracting.
2. 50% upon receiving and approving the final study.

11. Profile of the consultant person or team

Proven experience in development cooperation projects

The consultant (individual or team leader) must have a minimum of 5 years of experience working on development cooperation projects in Lebanon. Experience in the development of baselines for local NGOs in economic development issues will be an asset.

Experience in evaluation of development cooperation projects

The consultant will have at least 5 evaluations of projects of similar characteristics to the project for which the Baseline will be designed and developed.

Independence of the consultant team from the object of the baseline.

The consultant proposed to carry out the baseline study must be completely independent from the agreement for which the baseline is to be designed and prepared.

Quality of the proposal submitted by the consultant.

The extent to which the methodological proposal submitted by the consultant meets the conditions established in the terms of reference must be assessed.

Quality of the person providing the consulting service

The experience and degree of knowledge of the area will be evaluated. The consultant should also have a good knowledge of English.

Along with the documents proving the required experience, the candidates must submit a financial proposal for the implementation of the Baseline. On the basis of these requirements, each candidate will be assigned a score according to the following weighting.

No.	Criteria	Score
1	Financial offer	30%
2	Relevant academic qualifications	15%
3	Cumulative practical experiences	20%
5	Work methodology	20%
6	Time frame, working plan	15%
Final score		100%

12. Publicity of the ToR and reception of the bids

The ToR will be submitted to a list of consultors with experience in the region via email and will be published in the websites of the managing institutions.

Nominations should submit a proposal containing:

- a. Technical proposal related to the intervention proposed in the Convenio.
- b. Economic proposal.

The deadline for submitting proposals will be one week from the publication of the ToR. Candidates may also attach any document they consider relevant to the evaluation of their technical proposal. For any questions or clarifications, please contact m.cotelo@promocionsocial.org, i.aznar@promocionsocial.org and hiba.fawaz@adr.org.lb the same e-mail address to which the proposals will be sent.

Annexes to the proposal

- Formulation of the Convenio “Economic strengthening and social stability of vulnerable local and displaced communities in South Lebanon”