



## Call for Applications - Terms of Reference

### External Evaluation of Community of Practice on Partnership in the ESF (acronym: COP)

**VS/2009/0254 Learning for change – Setting up learning networks under the ESF / 2007-2013 announced by the European Commission / DG Employment, Social Affairs and Equal Opportunities**

#### 1. BACKGROUND

The “COP on Partnership in the ESF”, supported by the European Commission/Directorate-General for Employment, Social Affairs and Equal Opportunities in the frame of the restricted call for proposals VS/2009/0254 “Learning for change – Setting up learning networks under the ESF 2007-2013”, was set up as mutual learning network in January 2009. The transnational cooperation ensures knowledge exchange of ESF-Managing Authorities (MAs) as well as other stakeholders, in particular, other programme managing authorities, such as MAs of the ERDF. The COP focuses on partnerships being adopted by national and regional Operational Programmes (OPs) of Member states (MS).

The duration of the network supported within VS/2009/0254 is 30 months (1 January 2009 - 30 June 2011).<sup>1</sup>

The COP **aims** at learning from experiences and sharing knowledge on partnerships. Partnerships are recognised as valuable and essential policy instrument and practice with which policy outcomes of OPs, policies and actions can be enhanced. By building shared understanding and through learning from partnership practices COP members aim for improving policy planning and delivery as well as contributing to employment policy and delivering reforms. Thus, the COP network is a “governance network”.

The **mission** of the “Community of Practice on Partnerships in the ESF”, as defined by its members, is to stimulate more creative partnership thinking and implementation in the structural funds, especially in the European Social Fund (ESF). By providing high quality support to partnerships in the structural fund context the COP contributes to better performance of the EU with impact on employment and social inclusion (enhancing the employment situation, supporting social inclusion of (ESF) target groups and strengthening the economic development of the regions).

The **overall COP objective** is to contribute to enhanced policy outcomes. Through learning from experiences of its members the COP aims for developing improved policy frameworks for the promotion of partnerships. By providing high quality support to partnerships in the structural fund

<sup>1</sup> There is the possibility of a prolongation of the project duration until December 2011. A possible prolongation won't change the number of the meetings and won't have any influence on the budget. It is an only a temporal prolongation of the project. It is not yet confirmed.



context, the COP aims to contribute to better performance of the EU with impact on employment and social inclusion as well as contributing to delivering reforms.

The COP builds on an extensive cooperation between ESF-MAs dating back to 2003, when first common steps were taken as European Thematic Group on Partnerships. Followed by the period 2006-2008, collaborative milestones were achieved, one of which was the development of the "Key success factor framework" presented at the ESF-Exchange event in Malta in January 2008.

The Community of Practice 1/2009-6/2011 is guided by a steering group of 12 members with representatives from the ESF Managing Authorities, other Public Authorities or Technical Assistances) out of 9 MS.

More information about the COP in partnership in the ESF can be found under [www.partnership.esflive.eu](http://www.partnership.esflive.eu)

## 2. DESCRIPTION OF THE PROJECT ACTIVITIES

The project activities are divided in two pillars:

- Pillar A: Exchange & Learning
- Pillar B: Joint development

Please find a table highlighting the COP activities below:

| COP Activities                  |  |                               |                                       |
|---------------------------------|--|-------------------------------|---------------------------------------|
| Pillar A) "Exchange & Learning" |  | Pillar B) "Joint development" |                                       |
| Nr.                             | Activity   | Nr.                           | Activity                              |
| A.1.                            | Partnership portal   | B.1.                          | PEO Key Lesson reports                |
| A.2.                            | Policy fora  | B.2.                          | Partnership Learning Manual           |
| A.3.                            | COP meetings & PEO exploration   | B.3.                          | Communiqué on partnerships of ESF-MAs |
| A.4.                            | Peer reviews   |                               |                                       |
| A.5.                            | Partnership Conference   |                               |                                       |
| A.6.                            | Dissemination activities and exchange between other networks           |                               |                                       |
| A.7.                            | Project management activities (COP address database and reports, etc.) |                               |                                       |

The COP core activity for identifying and sharing good practices is the **COP meetings**. Regular face-to-face meetings are held throughout project duration. The kick off meeting was held in Vienna, Austria on 11 February 2009 and four COP meetings have already taken place in June 2009 (Lisbon), November 2009 (Stockholm), March 2010 (Berlin) and June 2010 (Chania). The 6<sup>th</sup> COP Meeting will be held in October 2010 in Dublin. Others are expected to be in January/February 2011 (Poland, Hungary,...).

The COP meetings are designed in order to support on-the-spot exchange on partnership practices and allow sharing of experiences. Each meeting will be held in different countries according to the altering chairmanship system (chairmanship of each COP core member lasting



for 4 months). Lessons learnt for other MS are discussed and common approaches on good practices to improve multi-level governance, sustainability, transnationality, as well as enhance capacities to innovate debated.

As integral part of each COP meeting, the specific situation of the chairing MS by implementing partnerships is reflected on-the-spot and the **Practices, Effects and Opportunities (PEO's)** explored by the COP. The COP focuses on the policy areas identified for ESF interventions, thereby examining:

- Partnership Practices of MS on all levels;
- Effects on policies as well as impacts for ESF target groups; and
- Opportunities for improving policy planning and delivery.

Opportunities for improving policy planning and delivery in each COP MS are discussed, common views developed and lessons learnt for other MS drawn.

PEO results are summarized after each meeting by the project management and independent experts in the **PEO Key Lesson reports**. The reports are published including detailed information on partnership activities in the MS. They also include the discussion results on the effects and opportunities of the MS. The PEO Key Lesson reports will also feed the **Partnership Learning Manual**.

### 3. PURPOSE OF EVALUATION

In order to assess the effectiveness and relevance of “COP on Partnership in the ESF”, COP Steering Group under the auspices of the lead partner BMASK – Austrian Federal Ministry of Labour, Social Affairs and Consumer Protection like to undertake an external evaluation.

The purpose of the evaluation is to assess the impact and effectiveness of the COP activities (including project management) in terms of the COP's overall objectives, in particular “enhancing policy outcomes”. Therefore implementation of Operational Programmes of COP core members should be assessed in order to estimate effectiveness of the mutual exchange of the COP partnership. Furthermore the evaluation should provide content for the “Partnership Learning Manual”.

It is expected that the evaluator shall work in close cooperation with the BMASK (as lead and contracting partner) and the Centre for Social Innovation (ZSI as project management assistance for the COP) in order to precisely fulfil all given tasks. Even though the working language will be English; the contract with the selected expert/institution will be concluded in German language.

### 4. CONTENT OF EVALUATION

The evaluation's main objective is to determine four main topics/questions listed below:

- **Adequate and proper instruments**  
Are the COP network activities (webpage, meetings, etc.) appropriate in order to attain the COP objectives?
- **Structure of the partnership**  
Is the partnership structured in a way to fulfil the tasks properly? Are the roles of the COP members adequate, relevant and executed in a result-oriented manner? Does the COP structure guarantee a high quality of partnership and exchange?
- **Outcome and sustainability**  
What are the effects of the COP in respect to enhancing policies outcomes of its members? What level of sustainability is reached by implementing the tasks of the COP in the specific way in order to assist MS to enhance policy outcomes?



COP evaluation will also have to take a deeper look at **challenges** like loss of commitment of members, minimising potential outcomes as achievements to reach national goals could come first, efforts to enable MS to adapt to sustainable change and the integration of lessons learnt by MS.

The programme evaluation is envisaged as a process that will consist of a number of clearly defined tasks. The tasks and activities to be fulfilled by evaluation after contracting include:

- 1) Evaluation concept: fine-tuning the evaluation strategy including methodology
- 2) Review of project documentations: desktop research of available documents and background information, minutes of meetings, papers, self-evaluation, examine documents of other COP networks, etc.
- 3) Participation in COP meetings and conduction of interviews: conducting two 'field' visits expected to be held on October 2010 and January/February 2011 (tbc) and carrying out interviews with experts and steering group members of the COP (minimum requirement).
- 4) Evaluation report: analysis (preliminary results presented in December/January 2010/2011) and drawing up the draft and final report<sup>2</sup>; results will be incorporated into the "Partnership Learning Manual"

## 5. APPLICANT'S PROFILE

The application has to be delivered in English language. Please propose an **evaluation method/concept** and specify how to achieve the evaluation results. The qualifications of the applying expert / institution for the evaluation should be demonstrated by **comprehensive CVs** showing the professional record, providing a list of relevant reference projects in the field under scrutiny and providing a **record of previous experience**. Each contractor has to provide a **statement** that he/she is available to execute requested tasks with indicated resource estimation in days (statement of availability).

The maximum budget earmarked for this evaluation is **€ 18.000.-**. This flat rate sum does include all transportation and accommodation costs as well as all other direct and indirect costs incurring during evaluation process.

### Requested qualification in details:

#### *Qualifications and skills*

- University degree of the expert/s in associated field

#### *General professional experience*

- At least 10 years programme evaluation experience

#### *Specific professional experience*

- Expertise in partnerships or relevant corporate structures (e.g. in the area of partnerships and governance in the EU and abroad)
- Experience in analysing/evaluation of programmes in labour market policy (employment partnerships)
- Knowledge of the European Structural Funds (especially European Social Fund), EU-Programmes (e.g. Community Initiative EQUAL)

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<sup>2</sup> See specific timetable on page 5



- Experience in European social, economic and labour market policies (particularly partnerships, innovative labour market initiatives, multi-level co-operation)

#### *Language skills*

- Fluent in English language, both written and spoken
- Fluent in two other official EU languages spoken is an advantage

## **6. TIMING**

The evaluation process should start end of October 2010 and be finalized by June 2011<sup>3</sup>. In the following you will find preliminary main dates of the COP project, which are relevant for the evaluation.

#### Main dates:

- *October 2010 until January/February 2011* – interview/data collection phase
- *19-20 October 2010* – 6th COP Meeting, Dublin
- *December 2010/January 2011* – interim report
- *March 2011* – draft evaluation report finished before Partnership Conference
- *April 2011* – Partnership Conference and presentation of the “Communiqué on partnerships of ESF-MAs”
- *May 2011* – Final evaluation report
- *June 2011* – COP project will end with last COP meeting and presentation of “Partnership Learning Manual”

**Estimated dates and places are subject to change!**

## **7. SELECTION CRITERIA**

The determined criteria for the selection of applications are 50% evaluation method and quality of evaluation concept, 25% professional experience and reference projects and 25% technical ability – budget.

## **8. CONTACT AND APPLICATION PROCEDURES**

The applications (including CVs, statement of availability, reference projects, description of the proposed methodology) have to be delivered to ZSI no later than **30 August 2010**, either by snail mail (at the risk of applicant) or hand delivered. Any application received after the deadline will not be considered.

|                                     |   |
|-------------------------------------|---|
| <u>Contracting Authority:</u>       | Austrian Ministry of Labour, Social Affairs and Consumer Protection (BMASK) on behalf of the COP Steering Group |
| <u>Tender application procedure</u> | Operationalized by ZSI – Centre for Social Innovation (www.zsi.at) on behalf of BMASK (www.bmask.gv.at)         |
| <u>Contact:</u>                     | Ms. Petra Moser   |
| <u>Address:</u>                     | Centre for Social Innovation<br>Linke Wienzeile 246<br>1150 Vienna<br>Austria                                   |
| <u>E-Mail:</u>                      | moser@zsi.at  |

<sup>3</sup> Please consider that the project will may be prolonged until December 2011.

