

## TERMS OF REFERENCE

### **Extending policy relevance of the Active Ageing Index: Cooperation with UNECE**

#### **I. Purpose**

The purpose of this evaluation is to review the implementation and assess the extent to which the objectives of the project “Extending the relevance of the Active Ageing Index (AAI): Cooperation with UNECE” (hereinafter “Project”) were achieved. The evaluation will assess the relevance, effectiveness, efficiency and sustainability of the project in enhancing national policy formulation on population ageing and intergenerational and gender relations.

The results of the evaluation will support improvement of the services provided as well as future projects and activities implemented by the UNECE Population Unit.

#### **II. Scope**

The evaluation will be guided by the objectives, indicators of achievement and means of verification established in the logical framework of the project documents. The evaluation will cover the organizational contribution of the UNECE Population Unit during the period of project implementation from 1 May 2016 to 31 August 2019. The project is intended for the benefit of all the UNECE countries, however, the evaluation will cover the countries / regions where AAI has been applied or for which it has been calculated and analysed, including the 28 EU countries, Norway, Republic of Moldova, Russian Federation, Switzerland.

The universally recognized values and principles of human rights and gender equality need to be integrated into all stages of the evaluation, in compliance with the United Nations Evaluation Group’s revised gender-related norms and standards. Therefore, the evaluation will assess how gender considerations were included in the process and it would make recommendations on how gender can be better included in the process.

#### **III. Background**

The current project builds on two previous phases of cooperation on the AAI between the UNECE Population Unit and the European Commission’s Directorate General for Employment, Social Affairs and Inclusion. The first two phases were separate projects with the European Commission as the donor. They took place from 3 January 2012 to 4 February 2013 and 1 August 2013 to 30 April 2016, respectively.<sup>1</sup>

The AAI — a composite measure of the untapped potential of older people to contribute to economy and society through employment, social participation, and living independently — was originally developed in 2012 (under the first phase, see above).

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<sup>1</sup> Final reports to the donor (European Commission), respectively [http://www.unece.org/fileadmin/DAM/pau/Finances/E147/E147-Report\\_Final\\_2011-2013.pdf](http://www.unece.org/fileadmin/DAM/pau/Finances/E147/E147-Report_Final_2011-2013.pdf) and [http://www.unece.org/fileadmin/DAM/pau/age/Active\\_Ageing\\_Index/Final\\_report\\_AAI\\_2013-2016.pdf](http://www.unece.org/fileadmin/DAM/pau/age/Active_Ageing_Index/Final_report_AAI_2013-2016.pdf)

The main project objectives are defined as follows: a) further work to develop the AAI methodology, in particular to enhance its flexibility and enable wider implementation; b) further promotion of use of AAI as flexible tool providing evidence base for policymaking, analytical work and advocacy; c) support to countries in their attempt to apply AAI for their needs at both national and subnational levels.

#### **IV. Issues**

The evaluation will answer the following questions:

##### **RELEVANCE**

1. How relevant was the project to the target groups' needs and priorities? How relevant was the project for the UNECE region needs and priorities?
2. To what extent was the project related to the UNECE programme of work?
3. How relevant are the activities with regards to gender equality and empowerment of women?
4. To what extent was the project design and development intervention relevant for meeting the project objectives?
5. How relevant were the partnerships with other entities?

##### **EFFECTIVENESS**

6. To what extent were the objectives of the project achieved? In particular:
  - a) How did the project contribute to the increased use of AAI for ageing policy monitoring?
  - b) How did the project contribute to a wider recognition of AAI as a useful flexible tool for analytical work, policy monitoring and advocacy in ageing-related areas?
7. To what extent and for what purposes is AAI used by the various stakeholders?
8. To what extent did the planned activities contribute to achieving the objectives and the expected accomplishments? In particular:
  - a) To what extent did the project activities, including studies on inequalities in three countries (Germany, Italy, Poland) and the development of Guidelines for calculating AAI in non-EU countries and at subnational level, contribute to building the evidence base on ageing?
  - b) How did the work of the Expert group help to promote the use of AAI among relevant stakeholders?
  - c) How did the Second international seminar on AAI contribute to the promotion of AAI use at different levels and in a large variety of countries?
  - d) To what extent were the national seminars in Italy, Poland, and Romania helpful to the local stakeholders in offering an insight into the active ageing situation in the country from the AAI perspective?
  - e) How did presenting AAI, maintaining the wiki-space devoted to the index, and the publication of briefs and reports on the AAI results contribute to better informing the stakeholders and wider recognition of AAI?
9. What were the challenges/obstacles to achieving the expected results?

10. To which extent a human rights-based approach and a gender mainstreaming strategy were incorporated in the design and implementation of the project?

#### EFFICIENCY

11. Did the project achieve its objectives within the anticipated budget and allocation of resources? If there were differences between planned and actual expenditures, were they justified?
12. Was the relationship between cost and results reasonable? How could the use of resources be improved?
13. Were the results achieved on time?
14. Where there any alternatives to achieve the same results? If yes, which ones?
15. How do the costs and use of resources compare with similar projects (within UNECE or by other United Nations agencies)?

#### SUSTAINABILITY

16. What is the likelihood that the beneficiaries of the project will continue using AAI in their work related to ageing policies?
17. How has the project built in resilience to future risks?
18. What were the major factors which influenced the achievement or non-achievement of sustainability of the project?
19. To which extent the projects have contributed to establish accountability and oversight systems between right holders and duty-bearers?
20. How did the project enhance national policy formulation on population ageing in selected UNECE countries?
21. How did the project contribute to adjustment of country policies or adoption of new measures for implementation of MIPAA/RIS?

### **V. Methodology**

The evaluation will be conducted on the basis of:

The *desk review* will be based on project reports and material available including: the agreement with the donor, interim and draft final (provided it is ready by the time of evaluation) reports on project implementation to the donor, project wiki-space; reports from the meetings of the Expert group on AAI; other documents necessary for this exercise.

The UNECE project manager will provide support and further explanation by Skype or phone to the evaluation consultant when needed.

A *tailored questionnaire* will be developed by evaluator in consultation with UNECE and sent to stakeholders working on/with AAI. The UNECE project manager will provide the list with contact details of the relevant stakeholders. Results of the survey will be disaggregated by gender.

The questionnaire will be followed by *interviews* of selected stakeholders (methodology to be determined by the evaluator in consultation with UNECE). These will be carried out via phone or other electronic means of communication.

UNECE will provide support and further explanation to the evaluator as needed.

A gender-responsive methodology, methods and tools, and data techniques are selected. The evaluation findings, conclusions and recommendations reflect a gender analysis.

## **VI. Evaluation schedule**

- Desk review of documents provided by UNECE to the evaluator (by 22 July 2019)
- Delivery of inception report including design of survey (by 22 July 2019)
- Feedback on inception report by the project manager (by 26 July 2019)
- Launching the survey (31 July 2019)
- Conducting interviews (by 23 August 2019)
- Analysis of collected information (by 6 September 2019)
- Draft report (6 September 2019)
- Comments back to the evaluator after review by the project manager and the PMU (16 September 2019)
- Final report (24 September 2019).

## **VII. Resources**

The requirement for an external evaluation is specified in the agreement with the donor. An evaluation consultant identified through the UNECE Evaluation Consultants' Roster will be hired and managed by the project manager (Vitalija Gaucaite Wittich).

The UNECE Programme Management Unit will provide guidance on the evaluation requirements, design, and review of the draft evaluation report.

The resources available for this evaluation are USD 20,000 (inclusive of all costs). Payment will be made upon satisfactory delivery of work.

## **VIII. Intended use / Next steps**

The evaluation will be consistent with the UNECE Evaluation Policy. The results will be used in the planning and implementation of future similar projects in the region and possibly beyond.

The findings of the evaluation will inform follow up actions and guide initiatives already started and required to disseminate the knowledge created and enhance its use. The outcomes of the evaluation will also contribute to the broader lessons learned, by being made available on the project website (UNECE sub-page).

## **IX. Criteria for evaluation**

The evaluator should have:

- An advanced university degree or equivalent background in relevant disciplines, with specialized training in areas such as evaluation, project management and social statistics.
- Good knowledge of and experience in population ageing issues, possibly with a specific knowledge of social policy and its monitoring.

- Relevant professional experience in design and management of evaluation processes with multiple stakeholders, survey design and implementation, project planning, monitoring and management.
- Demonstrated methodological knowledge of evaluations, including quantitative and qualitative data collection and analysis for end-of-cycle project evaluations.
- Fluency in written and spoken English.

Evaluators should declare any conflict of interest to UNECE before embarking on an evaluation project, and at any point where such conflict occurs.