

TERMS OF REFERENCE FOR THE FINAL EVALUATION OF THE INUA JAMII 70+: INNOVATIONS IN SOCIAL PROTECTION FOR OLDER PEOPLE IN URBAN KENYA (AFD IJ70+) PROJECT

1. Introduction to HelpAge International

HelpAge International is a global non-profit organisation that works to improve the lives of older people around the world. We work through the HelpAge global network, an alliance of organisations committed to the wellbeing, dignity, and voice of older people.

The organisation was founded in 1983, and [the global network](#) has more than 170 global members in more than 90 countries.

Our mission is to promote the rights and well-being of older people, and to help them live dignified and fulfilling lives. Through our work we address the challenges faced by older people, such as poverty, social isolation, and discrimination. We also advocate for policies and programmes that support the rights of older people and provide support to local organisations and communities working with older people.

2. Background to AFD project

The AFD (IJ70+) project is funded by the French Development Agency (AFD) through Age International and implemented by HelpAge International in Kenya with its community level partners Kibera Day Care Centre for the Elderly (KDCCE) and the Kenyan Aged Require Information, Knowledge and Advancement (KARIKA).

Other Partners include government entities led by the Ministry of Labour and Social Protection, Ministry of Gender, National Gender Equality Commission and Nairobi City County.

The project aimed to **improve the systems and access to social protection programmes for marginalised older women and men in urban communities of Nairobi, Kenya**. In order to achieve its general objective, the project was articulated around three Outcome Areas namely:

ACCESSIBILITY: Older women's and older men's access to the *Inua Jamii 70+* cash transfer programme in project locations is more effective, appropriate, and equitable.

SOCIAL ACCOUNTABILITY: The accountability of key target stakeholders in the delivery of the IJ70+ programme, and particularly the Government of Kenya, is increased including in project locations.

CAPACITY AND LEARNING Targeted State and Non-State social protection actors demonstrate increased capacity to deliver inclusive, integrated, age-gender &

disability-appropriate programmes in Kenya, informed by project learning and evidence.

3. Key Project Outputs:

Older women and older men, including and specifically those eligible to IJ70+, are **better informed on and more aware of their rights and entitlements** in relation to integrated social protection, age-disability-gender equality, governance, participation, and financial inclusion.

Barriers, risks and constraints (including negative and ageist attitudes in the community-at-large) which hinder equal access to age-specific social protection schemes or provisions in urban settings and in particular IJ70+ **are documented and addressed**, with a specific focus on gender and disability-related risks and inequalities.

Older women and older men in project locations, including the most vulnerable, have increased and equal agency to hold duty bearers to account towards the realisation of their rights to (integrated) social protection.

An effective, inclusive and responsive **complaints and grievances mechanism** is embedded in IJ70+ operations, for older women and older men to fully and equitably engage in accountability and governance at various levels.

Key **innovations and learning from the project are shared with and influence** the design and delivery of other age-appropriate cash transfer programmes in Kenya and internationally, particularly in relation to disability-gender equality and urban specificities.

The **capacity of targeted authorities** to effectively design and manage well-targeted, age-disability-gender-equitable, accountable, and inclusive social protection schemes for older people is **improved**.

Main innovative aspects about the project

The project envisioned the following innovations:

- i. A mix of IJ70+ and NHIF to cater for the blended need of Health at advanced age and Cash Transfer as income.
- ii. Use of technology as a delivery choice for the IJ 70+ CT- This is a tool that equity bank can conveniently offer because they have the equitel sim-cards for money transfer. Similarly, in urban areas, there is good telecommunication coverage and money transfer agents within proximity.
- iii. Highlight empowerment of older people- innovative structures-Older Persons Association (OPAs), Older Citizen Monitors (OCMs) and Age Demands Action (ADA) campaigns

4. Purpose of the evaluation and scope

The purpose of this activity is to evaluate the project in order to determine the impact on the lives of older men and women in the urban location (Nairobi).

Specifically, the study will also evaluate the contribution of the project to the systemic changes that might have occurred in the county as well as in the country in relation to access to social protection by older people. The evaluation will cover the project locations (Kibra and Dagoretti) in Nairobi, Kenya. The consultant/consulting firm will propose and design a suitable methodology in line with the evaluation objectives and ensuring the voices and feedback from older people as well as stakeholders are included.

5. Evaluation objectives

- a) To assess the project's direct contributions to change and achievement within the three project outcome levels.
- b) To assess the key external factors or drivers of progress toward the achievement of the project outcomes
- c) To assess the extent to which the project demonstrated continued relevance to identified priorities, needs and rights of all older people, ensuring inclusion and consideration of gender, disability, and age.
- d) To document lessons learnt from the programme implementation, successful approaches, key challenges, and recommendations for future work on social protection.
- e) To identify aspects of the project that are sustainable and replicable across different contexts.

6. Evaluation criteria

The consultants are expected to be guided by the following evaluation criteria across all activities.

Effectiveness

- a) What have been the project's direct contributions to change and achievements within the three programme objectives?
 - i. Individual level change
 - ii. System change
 - iii. Policy change
- b) What has been the role of partnerships in achieving the results?
- d) Does the available evidence support the claim that the progress in question occurred and if so, how?
- e) What are the key external factors or drivers in our progress towards the achievement of the outcomes?

Relevance

- a) To what extent does the project demonstrate continued relevance to identified priorities, needs and rights of older people?
- b) To what extent does the project complement and fit with other partners and government strategic plans?

Efficiency

- a) Did the project use the most efficient means to achieve its outcomes?
- b) How well have resources and inputs (funds, expertise, time, etc.) been allocated or used strategically to achieve the expected results?
- c) Have programme outputs been delivered in a timely manner? If not, what are the factors that have hindered timely delivery of outputs?
- d) To what extent have programme resources been leveraged with other related interventions to maximize impact, if any?
- e) Has the programme reached sufficient scale and depth for replication and scale up in other counties or even countries within the region?

Equity

- a) To what extent did the project address social differentiation (by gender, ethnicity, poverty/vulnerability, disability and age)?
- b) How well did project activities identify and address the different needs, priorities and inequalities experienced by these groups?
- c) How did the project ensure the voices of older people were included?

Accountability and learning

- a) To what extent did the project generate and communicate evidence and learning to inform future policy and practice to all stakeholders?
- b) What core elements of the model are replicable across different contexts?

Sustainability

- a) How well has the project invested in linkages to ensure that benefits have a lasting impact?
- b) What preparations were made to promote sustainability?
- c) To what extent are the planned results of the programme likely to be durable, maintained or even scaled up and replicated by other partners after major assistance has been completed?
- d) To what extent has the programme developed scalable and replicable models that can be used for future programming?
- e) How did the programme enhance local ownership and capacity to influence policy?

7. Evaluation methodology

The consultant/consulting firm should propose methodology and analytical framework that consider and respond to the evaluation objectives of this assignment.

HelpAge International is interested in reviewing proposals from consultants/consulting firms which entail using participatory research techniques to build in opportunities for communities to also reflect on and inform emerging findings.

The evaluation will be based on quantitative and qualitative research techniques with the viewpoint of the right holders and duty bearers.

Primary data collection is expected to gain insights into the viewpoints of the right holders, the community and the duty bearers, at the individual level, community level, and administratively at the subcounty, county and national levels. Secondary data collection will involve reviewing the relevant programme documents, in particular, but not limited to, the results framework, the relevant targets and indicators.

Data will be collected from older women and men including those with disabilities, community members, service providers at various levels, and policy/decision makers, partners, and other stakeholders. References should be made to existing research and policy documents.

Overall, the evaluation approach should be age, disability, and gender inclusive.

The methodology section should cover details of study design and approaches, sample size determination, data collection methods/instruments, data analysis techniques, plan for validation of study findings and a statement on quality assurance and ethical considerations during the study.

The expected methodology should be described in enough detail to ensure that the study can easily be replicated.

HelpAge will provide contacts for key stakeholder consultations and in mobilisation of older people as will be necessary for the successful execution of the evaluation.

8. Deliverables

- a) Inception Report (IR) detailing a proposed work plan with timelines, planned report outline, methodology and plans for analysis and results dissemination that will be agreed upon between the consultant/consulting firm and HelpAge.
- b) Data collection tools for consultation with and approval by HelpAge International and partners before data collection, analysis, interpretation.
- c) Draft Evaluation report with details of findings, recommendations and lessons learnt for review by HelpAge International.
- d) Validation workshop with relevant HelpAge programme staff and stakeholders as part of the validation exercise.
- e) Revised draft report based on the feedback from HelpAge review and the validation workshop.
- f) Two (2) qualitative in-depth case studies, one per target subcounty.
- g) Final evaluation report which compares and expounds the project performance in each sub county, and the overall project impact.
- h) Provide HelpAge with all data. This will be both in electronic and hard copy (MS Word document, PowerPoint slides).

NB: *The report content should include the standard cover sheet; executive summary; Introduction, description of study objectives and scope, study methodology and limitations; study findings, conclusions and recommendations, appendices, and references. The final outline will be discussed with and approved by the HelpAge staff.*

9. Timeframe and cost

The consultant/consulting firm is expected to indicate the number of days for the evaluation in line with their proposed methodology. The evaluation will begin in the month of **August 2024** and should be completed by **end of November 2024**. Payment will be based on submission of deliverables that are satisfactory and have been reviewed and approved as satisfactory, by the HelpAge team. The prevailing tax regime will apply on the overall consultancy fee.

Payment to the successful firm/consultant will be made as follows.

- 40% of the contract value after the approval of the inception report and data collection tools by HelpAge International
- 30% of the contract value after the submission and approval of the draft evaluation report by HelpAge International
- 30% of the contract value after the approval of final evaluation report

10. Ethics, safeguarding and code of conduct

The consultant/consulting firm will be working on behalf of HelpAge and will be required to sign and adhere to the HelpAge's safeguarding policy, code of conduct and ethical guidelines.

The firm/consultant/consulting firm will make clear to all participating stakeholders of all ages that they are under no obligation to participate in the exercise and that it is purely voluntary.

All participants will be assured that there will be no negative consequences if they choose not to participate. consultant/consulting firm must obtain informed consent from all participants. Prior permission must be obtained for taking and use of visual still/ moving images for specific purposes. The consultant/consulting firm will assure the participants' anonymity, confidentiality and will assure the visual data is protected and used for agreed purpose only.

As regards the documentation, the title rights, copyrights and all other rights of whatever nature in any materials used or generated under the provisions of this consultancy will exclusively be vested with HelpAge International.

11. Qualifications and experience required

To accomplish the objectives of the study, the consultant/consulting firm should have a multidisciplinary team with key qualifications and competencies as follows.

- a) Postgraduate degree preferably a doctorate in economics, demography, or other disciplines relevant to monitoring and evaluation.
- b) Minimum of 10 years' relevant professional experience of research in issues of social protection, demography, health policy, health systems and social impact.
- c) Thorough knowledge and substantial experience in the following key crosscutting issues: gender, age, and disability issues.
- d) Thorough understanding of the population ageing issues in Africa and the project locations
- e) Expert knowledge and experience in data collection and analysis for mixed method research.
- f) Proven experience in undertaking evaluation/research or leading evaluation/research teams, with outstanding skills in qualitative and quantitative research and data analysis using relevant software such as STATA, CPro or SPSS.
- g) Knowledge of participatory action research-methods.
- h) Excellent communication and report writing skills.
- i) Consultant with associates/consulting firm in the programme locations will be an added advantage.
- j) The consultant/consulting firm should be available to start work immediately.
- k) Ability to undertake the assignment in the two project locations.
- l) The ideal consultant/firm should be based in Kenya

12. Submission of technical and financial proposal.

All expressions of interest should include:

- Letter of interest (maximum one page) letter addressing the evaluation criteria.
- Technical proposal (maximum 10 pages-excluding study instruments) highlighting: profile of the lead the consultant/s with emphasis on relevant previous experience in this kind of work; profile of each of the other Consultant/s that will be involved in undertaking the study; understanding of the TOR, the study methodology, key contacts/references of previous similar work done.
- Financial proposal: The financial proposal should provide cost estimates for services rendered among them daily consultancy fees including accommodation, stationeries, and supplies needed for data collection etc. Data collection and data processing costs should also be included in the consultant's fee.

Submitting Expressions of Interest

All interested Individuals/firms are requested to express interest by email to: hr.kenya@helpage.org by **July 23, 2024**. Other means or later than the stated date will not be considered. Canvassing will lead to automatic disqualification.

****Only shortlisted bidders/candidates will be contacted****