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**Date:**February 14, 2020

**From:**Haiti Accessible Finance Activity; implemented by World Council of Credit Unions

**Subject:**    Consultant Team Leader- Final Performance Evaluation-Project Close Out

**Due:**          5:00 PM EDT on February 21, 2020

**Location:** Haiti

**Duration:** estimated 40 days

World Council of Credit Unions (WOCCU) is seeking a Consultant or a Consulting Firm for a short-term assignment to conduct a final performance evaluation and write a final performance evaluation report for the USAID-funded Haiti Accessible Finance Activity, which is scheduled to close on June 30, 2020.

**Project Description**

The Haiti Accessible Finance Activity, (known as *Finance pour Tous* in French), implemented by World Council of Credit Unions (WOCCU) and funded by the United States Agency for International Development (USAID), is a three-year activity supporting USAID’s overarching assistance goal in Haiti of “foundation for resilience, stability, and inclusive growth reinforced.” This Activity also supports the Central Bank of Haiti’s financial inclusion strategy to ensure the greatest possible access to savings, credit, and other financial products and services to reduce poverty and income inequality, creating a financially and economically more inclusive society. Building on knowledge gained under USAID’s previous financial inclusion project, HIFIVE, the Accessible Finance Activity tackles financial access challenges through two primary objectives:

Objective 1: Expand financial services and products to rural areas through groups and digital financial services (mainly the Field Officer Banking Methodology).

Objective 2: Sustainably address liquidity and capital challenges faced by MFIs and credit unions.

**Position Summary**

WOCCU is seeking applications from qualified candidates for a short-term assignment to design and conduct an external final performance evaluation of the USAID-funded Haiti Accessible Finance program to report on the extent of program success in achieving its objectives. In particular, the consultant will lead data collection and analysis using mixed methods, to produce a final performance evaluation report for the three-year Haiti Accessible Finance Activity. If the consultant is not based in Haiti, the consultant is expected to spend up to 30 days of the estimated 40-day period of performance in Haiti. WOCCU will cover travel expenses per an agreed upon budget with the consultant. Based on work plans, monitoring data, program performance reports, including a final performance report, and a mid-term assessment report, the final performance evaluation will include final outcomes of all program activities, lessons learned, and conclusions to help determine the impact of activities on communities where the program operated. In addition to data collected by the program team, the final performance evaluation will present data collected by subrecipients and will analyze results achieved, detailing successes and shortfalls in the progress towards program objectives.

The consultant will work under the guidance of the Accessible Finance Monitoring and Evaluation team for an estimated period of 4 weeks to produce the final performance evaluation report (10 days are estimated for the consultant to write the final report). Local enumerators can be recruited to support data collection upon request of the Consultant.

This final evaluation will address the extent to which the program has achieved its planned results and met its predetermined targets at the conclusion of the implementation period, as well as whether activities had unintended consequences. In accordance with the program’s Results Framework, the final performance evaluation will consider which outputs where produced, and to what degree the program planned results and objectives were achieved, as detailed below:

Objective 1: Expand financial services and products to rural areas through groups and digital financial services (mainly the Field Officer Banking Methodology)

* IR 1.1 Developed linkages between formal financial institutions and community-based groups
* IR 1.2 Increased access to formal financial services in rural areas

Objective 2: Sustainably address liquidity and capital challenges faced by MFIs and credit unions

* IR 2.1 Deposit mobilization, through supporting ANACAPH, the national association of

credit unions

* IR 2.2 Investment mobilization, through supporting MFI FINCA Haiti.

Accordingly, the evaluation will be structured around the three main components of the program:

1. KPPP Services/Field Officer Banking Methodology
2. Deposit mobilization
3. Investment mobilization

The final performance evaluation report must contain the following information, as relevant:

* Executive summary;
* Assessment methodology;
* Analysis and findings. This section will present an in-depth analysis of progress and results of all program activities, synthesizing achievements and the extent to which they contributed to program objectives. This section will include:
  + Final data compared to baseline data for all indicators included in the monitoring and evaluation plan, including disaggregated data by sex. Final program results, including any differential impact on men and women or their effects on target populations, historically disenfranchised groups, and other relevant groups identified;
  + Summary of challenges encountered during implementation, and how those challenges were addressed, if appropriate;
* Conclusions, lessons learned, and recommendations for future programming in this sector.

**Scope of Work**

To achieve the expected result and deliverables, the Consultant will perform the duties with detailed scope of work as follow:

Desk Review

Conduct desk review of the existing data and program reports from startup to close out. This may include but is not limited to program documents, manuals, performance reports, monitoring data, and baseline and midline assessment reports.

Evaluation Design and Methodology

Lead the drafting and finalization of the evaluation design including: data collection instruments, data collection and analysis plans, work plans, sampling plans, and other relevant sections. Consult with the Accessible Finance Monitoring and Evaluation team to agree on the evaluation design and methodology.

Layout of Final Performance Evaluation Report:

Consult with the Accessible Finance Monitoring and Evaluation team to agree on the layout of the report.

Interviews and Discussions:

* Conduct interviews with program staff to gain a deeper insight of program results, challenges, and successes as needed.
* Carry out and oversee data collection based on the approved evaluation design and methodology. Local enumerators can be recruited to support data collection upon request of the Consultant.

Data Analysis:

Conduct analysis of existing and newly collected performance data to report on program performance toward indicators. Utilize statistical tools (such as SPSS) for data analysis and interpretation as needed and in line with the approved evaluation design.

Compilation of results:

Compile the results, impacts, and lessons learned from the program based on the data analysis; complete and submit the final performance evaluation report.

**Deliverables**

* A work plan (5-10 page in length) explaining the methodology and approaches for the evaluation, schedule of activities, and the layout of the final evaluation report. The work plan has to be approved by WOCCU before proceeding in implementation.
* Final performance evaluation report, using agreed layout. The report should comprehensively cover data analysis, program results, impacts, lessons learned, and recommendations.

**Period of Performance**

The period of performance for this scope of work should not exceed May 25th.

**Available resource materials**

The Accessible Finance team and its partners will provide the Consultant with necessary documents and guidance on data sources. The Consultant is also expected to identify and solicit additional information and resources from partner organizations, as appropriate.

**Selection Criteria**

Consultant qualifications include:

* Master’s degree in social sciences, statistics, or related field.
* Minimum of 5 years of experience in program monitoring and evaluation, with a focus on evaluation and performance data management for donor-funded projects.
* Experience working with USAID-funded programs and international donors required.
* Experience utilizing and combining quantitative and qualitative data.
* Proficiency in SPSS or similar statistical analysis tools.
* Proven evaluation team management and leadership experience, including directing data collection teams.
* Sound knowledge of USAID program cycle and USAID evaluation policy
* Excellent analytical and report writing skills.
* Excellent skills in data management, analysis, and reporting
* Fluency in French and English required; knowledge of Creole is an advantage.

**Applications**

Candidates must submit:

* Resume or CV
* Proposal detailing (a) relevant work experience and qualifications to perform this assignment, (b) anticipated approach, and/or understanding of this assignment, and (c) proposed rate
* Examples of similar previous work
* 3 references

Applications should be submitted by email to [dmehiar@woccu.org](mailto:dmehiar@woccu.org) by the closing date stated above. Should you have any questions, please feel free to contact [dmehiar@woccu.org](mailto:dmehiar@woccu.org).

The Consultant must comply with WOCCU and USAID rules and regulations.

**DISCLAIMER**

This bid solicitation in no way obligates World Council of Credit Unions to award a contract, nor does it commit World Council of Credit Unions to pay any costs incurred in the preparation and submission of the application. World Council of Credit Unions reserves the right to vary any part of this bid solicitation at the time of award if it becomes necessary.