## Terms of Reference (TOR)

| | |
|---|---|
| For evaluation of project:<br>**"Social inclusion for life in dignity of Roma and other vulnerable persons in Serbia 2023 - 2026"** | |
| Made (internally / independently / externally)<br>**Final External Evaluation** | |
| Of (start / mid-term / final / ex-post / other)<br>**Project end of phase** | |
| In (country)<br>**Serbia** | **ToR for EVALUATION were reviewed by M&E team?**<br>**Signature of M&E:_____** |

## 1 DESCRIPTION OF THE INTERVENTION

The project **Social Inclusion for Life in Dignity for Roma and Other Vulnerable Persons in Serbia (2023–2026)** is implemented by the **Ecumenical Humanitarian Organization (EHO)** with the support of **HEKS/EPER Switzerland**. It builds on EHO's long-term engagement in promoting the human rights and social inclusion of Roma communities and represents the continuation of previous programmed phases implemented in partnership with local self-governments, educational institutions, civil society organizations and national stakeholders

The overall goal of the project is to contribute to a society in which **Roma and other vulnerable persons enjoy equal rights, opportunities and access to public services without discrimination**, enabling them to live with dignity and actively participate in social, educational and economic life.

The intervention addresses persistent structural barriers affecting Roma communities, including discrimination and antigypsyism, unequal access to quality education, insecure housing conditions and limited participation in decision-making processes. Through a human rights-based and participatory approach, the project seeks to strengthen both the capacities of rights-holders to claim their rights and the capacities of duty-bearers to fulfil their obligations.

The project is structured around three mutually reinforcing outcomes:

**Outcome 1: Prevention of discrimination and promotion of equal treatment.** The project strengthens institutional capacities to prevent discrimination and antigypsyism, empowers Roma communities to recognize and report discrimination, supports schools in promoting equality and diversity, and engages the media in fostering positive public narratives about Roma inclusion.

**Outcome 2: Inclusive education.** The project contributes to improved educational inclusion and equal opportunities for Roma children and other vulnerable pupils by strengthening the capacities of schools and educational professionals, promoting intercultural education, supporting peer education and mentoring, reducing school dropout and facilitating successful transition to secondary education.

**Outcome 3: Housing rights and social inclusion.** The project supports improved access to adequate housing through legalization of housing, strengthening municipal capacities for inclusive housing policies, improving access to public services and promoting participatory approaches to housing and local development.

The intervention is implemented in partnership with seven local self-governments in Serbia (Kovin, Beočin, Velika Plana, Zvezdara, Voždovac, Kragujevac and Niš) and involves a broad range of stakeholders, including educational institutions, national and local authorities, independent institutions, civil society organizations, media representatives and community-based actors. Throughout

implementation, particular attention is given to the participation of Roma women, youth and other vulnerable groups.

Human rights, gender equality, participation, non-discrimination and local ownership are integrated as cross-cutting principles across all project activities.

## 2 PURPOSE AND SCOPE OF THE EVALUATION

**Purpose:**

The purpose of the Final External Evaluation is to provide an independent, objective and evidence-based assessment of the project's overall performance, achievements and contribution to improving the social inclusion of Roma and other vulnerable persons in Serbia.

The evaluation will assess the extent to which the project has achieved its intended outcomes and contributed to sustainable changes for the target groups, institutions and local communities. It will also identify good practices, lessons learned and remaining challenges that can inform future programming and organizational learning.

The evaluation has both **accountability** and **learning** purposes.

From an accountability perspective, it will assess the project's performance against its stated objectives, expected outcomes and indicators, providing evidence of results achieved for EHO, HEKS/EPER and other stakeholders.

From a learning perspective, the evaluation will identify factors that contributed to or hindered project implementation, document successful approaches and provide practical recommendations to strengthen the design and implementation of future Roma inclusion programs.

The evaluation findings will primarily be used by:

- EHO;
- HEKS/EPER Switzerland;
- project staff and management;
- partner municipalities and institutions;
- relevant national stakeholders involved in Roma inclusion;
- future program designers and donors, where appropriate.

**Scope:**

The evaluation will cover the entire implementation period of the project from January 2023 to December 2026.

It will assess the project as a whole, including all three outcomes and the main interventions implemented during the project period. The evaluation is expected to examine the project's contribution to:

- prevention of discrimination and promotion of equal treatment;

- strengthening inclusive education;

- improving access to housing rights and social inclusion;

- strengthening institutional capacities and partnerships;

- promoting participation and empowerment of Roma communities.

The evaluation shall consider results achieved at the level of beneficiaries, partner institutions and local communities, while also assessing the project's contribution to broader policy and institutional changes where evidence is available.

The geographical scope includes the municipalities participating in the project. However, to ensure a proportionate and cost-effective evaluation within the available budget, the evaluator is expected to propose a representative sampling approach for field visits and primary data collection. The final sampling strategy shall be presented and justified in the Inception Report.

The evaluation should also assess the integration of cross-cutting principles throughout the project, including:

- Human Rights-Based Approach (HRBA);
- gender equality;
- participation and empowerment;
- non-discrimination and inclusion;
- local ownership and sustainability.

The evaluation is not expected to verify every individual project activity or beneficiary record. Instead, it should assess the project's overall performance through a representative and evidence-based approach, making effective use of existing monitoring information, project documentation and targeted consultations with key stakeholders and beneficiaries. The evaluation should focus on strategic findings and evidence of outcomes rather than on the implementation of individual activities.

## 3 EVALUATION CRITERIA AND KEY QUESTIONS

The evaluation shall be conducted in accordance with the HEKS/EPER Evaluation Policy. It is expected to provide an independent assessment of the project's performance, results and sustainability, while generating practical recommendations for future programming. In particular, the evaluation should provide an understanding of the value of the HEKS/EHO partnership, programs' adaptation to the changing political context, and the role of policy and advocacy under democratic backsliding. Also, given the changing and more challenging donor landscape and EHO's organisational fundraising efforts, learning what makes EHO's approach distinctive, which program elements are worth scaling or replicating, and which approaches future donors should continue investing in.

In addition, the evaluation shall examine the integration of the project's cross-cutting principles, including the Human Rights-Based Approach (HRBA), gender equality, participation, non-discrimination, inclusion and local ownership.

The questions below are indicative and may be further refined by the evaluator during the inception phase.

Relevance:

1. To what extent did the project respond to the priority needs of Roma and other vulnerable groups?
2. Was the intervention aligned with national and local policies related to Roma inclusion, anti-discrimination and social inclusion, and with the level of their actual implementation?
3. To what extent did the project's objectives and intervention approaches remain relevant amid significant political and societal changes in Serbia?

Effectiveness

4. To what extent were the planned outputs and outcomes achieved?
5. To what extent did partnerships contribute to achieving the expected outcomes?

6. How effectively did the project respond to challenges encountered during implementation, particularly in light of the evolving political and civic context in Serbia since November 2024, as well as organisational and structural changes in EHO?
7. Which aspect of HEKS/EPER's support proved to be the most and the least effective in strengthening EHO's organisational capacities to achieve project objectives?

Efficiency

8. Were financial, human and technical resources used efficiently?
9. Were the project management, coordination and communication arrangements appropriate?
10. Was the balance between resources invested and results achieved appropriate?

Impact

11. To what extent has the project contributed to reducing discrimination and improving social inclusion?
12. Which approaches have the strongest evidence of success?
13. What contribution did the project's policy engagement make to strengthening accountability, institutional dialogue and public service delivery?
14. To what extent has the project contributed to strengthening the agency, leadership and collective action of Roma communities independently of institutional responsiveness?

The evaluation should recognize that broader social change results from multiple influencing factors and therefore assess the project's contribution rather than attempting to attribute all observed changes solely to the intervention.

Sustainability

15. Which policy engagement approaches appear most likely to remain effective under the current governance and political context?
16. Are partners, if any, able and willing to continue project activities or approaches?
17. Whose capacities have been strengthened sufficiently to sustain project results?
18. Which interventions deserve scaling, and which interventions should future programs stop implementing?
19. Which capacities position EHO well for future donors?
20. What are EHO's comparative strengths compared to other organisations working on Roma inclusion?

Cross-cutting Issues

Across all evaluation criteria, the evaluator is expected to assess how effectively the project integrated the following principles:

- Human Rights-Based Approach (HRBA);
- Gender Equality;
- Participation and Empowerment;
- Non-discrimination and Inclusion;
- Local Ownership;
- Partnership and Cooperation.

The evaluation should identify examples of good practice as well as areas requiring further improvement

Existing Evidence

The evaluator is expected to build upon existing project evidence and avoid unnecessary duplication of data collection.

The evaluation should make effective use of available documentation and monitoring information, including project reports, the logical framework, monitoring data, baseline and endline information

(where available), communication materials, relevant national statistics and policy documents, as well as other credible sources of evidence.

The detailed **evaluation matrix**, including the final evaluation questions, judgement criteria, indicators, data sources and methods of verification, shall be developed by the evaluator during the **inception phase**.

## 4 METHODOLOGY AND PROCESS

The evaluator is expected to propose an appropriate evaluation methodology that is consistent with the purpose and scope of this Terms of Reference and reflects internationally recognized evaluation standards.

The evaluation should apply a mixed-methods approach, combining qualitative and quantitative data where appropriate, to ensure a balanced and evidence-based assessment of project performance and results.

The proposed methodology should be proportionate to the scope and complexity of the intervention and should make effective use of existing project documentation and monitoring data. The evaluation is expected to focus on strategic findings and evidence of outcomes rather than on verification of individual project activities.

As a minimum, the evaluation methodology should include:

- a comprehensive review of relevant project documentation;
- consultations with key EHO staff;
- consultations with key HEKS/EPER staff;
- consultations with representatives of partner institutions;
- consultations with a representative sample of project beneficiaries;
- review and analysis of available monitoring and project performance data;
- field visits to a representative sample of project locations.

The evaluator shall determine the most appropriate sampling strategy, taking into consideration the geographical coverage of the project, diversity of stakeholder groups and the available resources. The proposed sample should be sufficient to ensure credible findings while remaining proportionate to the available budget and timeframe.

The evaluation methodology shall ensure the triangulation of findings by drawing upon multiple sources of evidence, including project documentation, monitoring information, interviews, consultations and field observations, where relevant.

Cross-cutting principles, including human rights, gender equality, participation, inclusion, non-discrimination and local ownership, shall be considered throughout the evaluation process, including the design, data collection, analysis and reporting stages.

The evaluator is expected to identify any methodological limitations and propose appropriate mitigation measures.

**Inception Phase**

Following contract signature, the evaluator shall prepare an Inception Report, which will further elaborate the proposed evaluation approach and serve as the basis for implementation of the evaluation.

The Inception Report shall include, as a minimum:

- refined evaluation methodology;
- detailed evaluation matrix;

- proposed sampling strategy;
- data collection tools;
- detailed work plan and timeline;
- description of data analysis methods;
- identified risks, limitations and proposed mitigation measures.

The field phase may commence only after the Inception Report has been reviewed and approved by EHO and HEKS/EPER.

**Quality Standards**

The evaluation shall be conducted in accordance with HEKS/EPER Evaluation Policy. The evaluator shall ensure:

- independence and impartiality throughout the evaluation process;
- confidentiality of information and protection of personal data;
- informed consent of all participants;
- respect for the dignity, safety and privacy of respondents;
- objective reporting based on verifiable evidence.

**Cost-effectiveness**

Applicants are expected to propose a methodology that is realistic, feasible and proportionate to the finances and time-line.

The proposed approach should ensure a robust and credible evaluation while avoiding unnecessarily resource-intensive methods. EHO encourages innovative and cost-effective approaches that optimize the balance between desk review, remote consultations and targeted field visits without compromising the quality and credibility of the evaluation.

The quality, feasibility and value for money of the proposed methodology will be considered during the selection process.

## 5 DELIVERABLES

The evaluator shall be responsible for delivering the following outputs in English.

1. **Inception Report:** Within 10 working days after contract signature and completion of the initial desk review, the evaluator shall submit an Inception Report for review and approval by EHO and HEKS/EPER. The Inception Report should demonstrate the evaluator's understanding of the assignment and provide a clear plan for the implementation of the evaluation.
At a minimum, it shall include:

- understanding of the assignment and evaluation objectives;
- refined evaluation methodology;
- detailed evaluation matrix;
- proposed sampling strategy;
- data collection methods and tools;
- work plan and timetable;
- description of data analysis methods;
- identified risks, limitations and mitigation measures;

The field phase shall commence only after the Inception Report has been approved.

2. **Data Collection Tools:** Prior to the field phase, the evaluator shall submit the proposed data collection tools, including interview guides, focus group discussion guides and any other instruments that will be used during the evaluation.
These tools may be submitted as annexes to the Inception Report

3. **Debriefing and Preliminary Findings:** Following completion of the field work and preliminary analysis, the evaluator shall present the preliminary findings to EHO and HEKS/EPER.

The purpose of this meeting is to: validate factual information; clarify outstanding issues; discuss preliminary conclusions; identify any additional information required before preparation of the draft report. The discussion shall not compromise the evaluator's independence or influence the evaluation conclusions.

4. **Draft Final Evaluation Report:** The evaluator shall submit a Draft Final Evaluation Report for review by EHO and HEKS/EPER. The report should present evidence-based findings, conclusions and practical recommendations. Comments provided by EHO and HEKS/EPER will focus on factual accuracy and completeness and shall not compromise the evaluator's independence.

5. **Final Evaluation Report:** The evaluator shall submit the **Final Evaluation Report** after incorporating any agreed factual comments received on the draft. The report should be concise, analytical and evidence-based. The recommended length is **30–40 pages**, excluding annexes.

The report shall include the following sections:

1. Executive Summary
2. Introduction
3. Project Background
4. Purpose and Scope of the Evaluation
5. Evaluation Methodology and Limitations
6. Findings by Evaluation Criterion
7. Conclusions
8. Lessons Learned
9. Recommendations
10. Annexes

The **Executive Summary** should not exceed **3–4 pages** and should include:

- purpose of the evaluation;
- methodology;
- key findings;
- main conclusions;
- strategic recommendations.

The Executive Summary should be suitable for stand-alone distribution.

**Annexes** the Final Report should include, where applicable:

- Terms of Reference;
- Evaluation Matrix;
- List of Documents Reviewed;
- List of Interviews and Consultations;
- Data Collection Tools;
- List of Field Visits;
- Any additional information considered relevant by the evaluator.

**Ownership and Confidentiality**

All deliverables produced under this assignment shall become the property of EHO and HEKS/EPER.

The evaluator shall maintain confidentiality regarding all information collected during the evaluation and shall not disclose or publish any findings without prior agreement of EHO and HEKS/EPER.

All deliverables should be available in electronic form and forwarded to EHO and HEKS/EPER.

## 6 SCHEDULE AND BUDGET

The evaluation is expected to be carried out between September and December 2026, according to a timetable agreed between the selected evaluator, EHO and HEKS/EPER.

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| *Deadline for invitation/announcement:* | 27 July 2026 |
| *Deadline for submission of offers:* | 27 August 2026 |
| *Selection and contracting evaluators:* | September 2026 |
| *Inception Report approved:* | End of September 2026 |
| *Data collection (document review, interviews and field visits)* | October - November 2026 |
| *Presentation of preliminary findings* | End of November 2026 |
| *Submission of Draft Evaluation Report* | Early December 2026 |
| *Review by EHO and HEKS/EPER* | First half of December 2026 |
| *Submission of Final Evaluation Report* | No later than 20 December 2026 |

Total working days expected for the evaluation are between **20-25 days**. The evaluator shall propose a realistic allocation of working days across the phases of the evaluation in the technical proposal.

The proposed financial offer shall include all costs associated with the assignment, including but not limited to: professional fees; travel and accommodation; local transportation; daily allowances, where applicable; communication and administrative costs; taxes and other statutory obligations; all other expenses necessary for successful completion of the assignment. No additional funds beyond the agreed contract value will be made available.

Applicants are requested to submit a detailed **financial proposal** indicating: professional fees; estimated number of working days; travel and other reimbursable costs; total proposed contract value in **Serbian Dinars (RSD)**. The financial proposal shall clearly demonstrate that the proposed budget is sufficient to complete the assignment in accordance with these Terms of Reference.

Applicants are expected to propose a methodology that is realistic, feasible and proportionate to the available budget.

The proposed approach should ensure a robust and credible evaluation while avoiding unnecessarily resource-intensive methods. EHO welcomes innovative and **cost-effective** evaluation designs that optimize the balance between desk review, remote consultations and targeted field visits without compromising the quality and credibility of the evaluation. The quality, feasibility and value for money of the proposed methodology will be considered during the selection process.

The contract will be awarded as a lump-sum contract. Payments will be linked to the satisfactory completion and approval of the agreed deliverables.

## 7 MANAGEMENT ROLES AND RESPONSIBILITIES

The evaluation is mandated by HEKS/EPER (Switzerland) and EHO (Serbia). The HEKS/EPER responsible program officer and EHO responsible project officer will have the final decision on the evaluation questions.

The HEKS/EPER responsible program officer and the EHO responsible project officer will provide their feedback on every aspect of the evaluation, and they will provide consultants with all required documents. EHO shall ensure that the evaluator has timely access to the information required to conduct the assignment.

The evaluator shall be fully responsible for the professional and independent implementation of the evaluation. The evaluator has the responsibility for preparing the overall evaluation design, decide on the methodology and tools (in consultation with HEKS/EPER and EHO), develop the questionnaires for interviews and focus group discussions, plan and conduct the data collection, analyse the data, and write the reports (inception, draft, final), apply appropriate and ethical evaluation methods, ensure that findings, conclusions and recommendations are evidence-based and supported by reliable data, maintain confidentiality of all information obtained during the assignment, deliver all agreed outputs within the agreed timeframe.

The Project Coordinator appointed by EHO shall serve as the primary focal point for day-to-day **communication** with the evaluator. Regular communication between the evaluator, EHO and HEKS/EPER is expected throughout the assignment to ensure a timely exchange of information and effective **coordination**. Such communication shall support the evaluation process without compromising the evaluator's independence.

The **evaluator** shall perform the assignment **independently** and objectively. Neither EHO nor HEKS/EPER shall seek to influence the evaluator's professional judgement, findings, conclusions or recommendations. The evaluator shall disclose any actual or potential conflict of interest that could affect the impartiality of the evaluation before the assignment begins or at any stage during the evaluation process.

## 8 FOLLOW-UP OF THE ASSESSMENT

The purpose of the evaluation is not only to assess the project's achievements but also to generate knowledge to support organizational learning, accountability and the continuous improvement of future programming. Following submission of the Final Evaluation Report, EHO and HEKS/EPER will review the findings, conclusions and recommendations and discuss their implications for future program design and implementation.

The evaluation findings will be used to: assess the overall performance and results of the project; strengthen organizational learning within EHO; identify good practices and lessons learned; improve the design and implementation of future Roma inclusion programs; inform strategic planning and future funding proposals; and contribute to accountability towards the donor, project partners and other stakeholders.

The Final Evaluation Report may be shared with HEKS/EPER, project partners, relevant institutions and other stakeholders, as appropriate. Any wider dissemination of the report shall be agreed upon by EHO and HEKS/EPER, taking into consideration confidentiality requirements and data protection obligations.

On this basis, a Management Response to the evaluation will be written by HEKS/EPER and EHO.

## 9 LIST OF DOCUMENTS

The documentation to be made available includes, but is not limited to:

> Project Document with LFA, Theory of Change and annexes;

> Annual and Semi-annual Reports 2023, 2024, 2025 and Semi-annual report 2026 with relevant annexes, selected case studies, success stories and lessons learned;

> Project publications;

> List of projects partner's addresses (provided by EHO);

> Monitoring data: Access to the respective data-basis will be provided by EHO;

> Baseline Report, School Assessment Report and Exit Strategy;

The evaluator is expected to consider the broader policy and institutional context, including relevant national and international documents, such as: Strategy for Social Inclusion of Roma in the Republic of Serbia (2022–2030); Action Plan for the Implementation of the Strategy (where applicable); Relevant legislation related to anti-discrimination, education, housing and social inclusion; HEKS/EPER Evaluation Policy.

Additional documentation considered relevant for the evaluation may be provided by EHO upon request or identified by the evaluator during the inception phase. The evaluator is encouraged to identify any additional publicly available documents, research, or statistical data that may support the analysis and strengthen the evaluation's evidence base.

## 10 ASSESSMENT TEAM / QUALIFICATIONS

The evaluation shall be conducted by an independent evaluator or evaluation team with demonstrated experience in evaluating development programs, preferably in the areas of social inclusion, human rights, anti-discrimination, education, housing and local governance. The evaluator is expected to meet the following qualifications:

- Advanced university degree (Master's or equivalent) in social sciences, public policy, economics, political science, sociology, law, education, development studies or another relevant field
- At least 5 years of research, evaluation and/or other relevant professional experience
- Demonstrated experience in evaluating projects funded by international donors.
- Relevant experience in social inclusion of vulnerable groups
- Experience in designing and implementing mixed-method evaluations
- Relevant experience in education and sound knowledge of education system in Serbia
- demonstrated experience in one or more of the following areas; Roma inclusion; human rights and anti-discrimination; inclusive education; housing and social inclusion; local governance and public administration; civil society development
- Strong analytical skills and proficiency in writing in English
- Serbian language skills would be an asset
- Ability to deliver quality reports / analysis and results in line with established deadlines
- The consultant will be asked to submit 2 samples of previous similar work produced, as well as 2 references

The evaluator must not have been involved in the design or implementation of the project and must declare any actual or potential conflict of interest before signing the contract.

## 11 APPLICATION PROCEDURE

### Interested applicants are invited to submit the following documents:

- Technical Proposal (should include understanding of the assignment; proposed evaluation methodology; indicative work plan; proposed team composition if applicable; estimated number of working days.
- Financial Proposal (complete cost estimate in Serbian Dinars RSD, including all taxes and costs associated with the assignment)
- Curriculum Vitae (CV) of the evaluator or each team member
- Two references from similar evaluation assignments completed within the last five years

- One sample of a recent evaluation report (or executive summary), where confidentiality permits

The offer in electronic form (preferably in one file) should be submitted to stevan@ehons.org **by 27th August, 2026.**

Only shortlisted candidates may be invited for clarification or an interview.

## 12 SELECTION CRITERIA

Applications will be evaluated using the **Best Value for Money** principle. The evaluation committee will assess both the technical quality and the financial proposal.

The indicative evaluation criteria are presented below.

| Criterion | Maximum Points |
|---|---|
| Relevant professional experience | 20 |
| Understanding of the assignment | 20 |
| Proposed methodology | 25 |
| Relevant thematic expertise | 15 |
| Work plan and feasibility | 10 |
| Financial proposal | 10 |
| **Total** | **100** |

Only proposals demonstrating sufficient technical quality will be considered for financial evaluation.

EHO reserves the right not to award the contract if no proposal meets the required quality standards.