



## USAID Youth Excel: Our Knowledge, Leading Change Program

### Mid-Term Evaluation Partner

**Request for Applications (RFA) No. FY23-Youth Excel-Evaluation-01  
Extended Deadline: September 19, 2022, by 23:59 GMT**

Application Information	
<b>Request for Applications (RFA) Number</b>	FY23-Youth Excel-Evaluation-01 Issued under USAID Youth Excel Cooperative Agreement Number 7200AA20CA00024
<b>Website</b>	Access all grant competition information online at: <a href="https://www.irex.org/program/seeking-evaluation-partner-conduct-youth-excel-mid-term-evaluation">https://www.irex.org/program/seeking-evaluation-partner-conduct-youth-excel-mid-term-evaluation</a>
<b>Social Media</b>	Follow communication updates on social media at: Facebook: <a href="https://www.facebook.com/youthexcelprogram">https://www.facebook.com/youthexcelprogram</a> Twitter: <a href="https://twitter.com/excelyouth">https://twitter.com/excelyouth</a>
<b>Email</b>	Email the Youth Excel team at: <a href="mailto:excelyouth@irex.org">excelyouth@irex.org</a> Subject line: "FY23-Youth Excel-Evaluation-01"
<b>Information</b>	Submit questions by social media or email (see above). Youth Excel will respond to questions on public social media daily and publish responses to all questions received by <b>August 5, 2022</b> . The responses will be posted online and shared by social media and email by <b>August 8, 2022</b> .
<b>Application</b>	Submit applications online at: <a href="https://irexorg.formstack.com/forms/fy23_youth_excel_evaluation_01">https://irexorg.formstack.com/forms/fy23_youth_excel_evaluation_01</a>
Timeframe	
<b>Issue Date</b>	<b>July 21, 2022</b>
<b>Questions Due</b>	<b>August 5, 2022</b>
<b>Answers Posted</b>	<b>August 8, 2022</b>
<b>Close Date</b>	<b>August 22, 2022, at 23:59 GMT</b>
<b>Extended Deadline</b>	<b>September 19, 2022</b>
<b>Grant Start Date</b>	<b>October 2022</b>





## Overview

**About Youth Excel:** The [USAID-funded Youth Excel: Our Knowledge Leading Change program](#) implemented by IREX and its consortium supports young leaders and youth-led and youth-serving organizations around the globe to conduct quality “research-to-change” (implementation research); use data and learnings to improve their own cross-sectoral, positive youth development programs; synthesize data and learning; and engage in intergenerational dialogue with adult decision-makers so that together youth and adults can shape and advance data-informed development policies, agendas, and programs.

**About the Request for Applications:** Youth Excel is seeking an experienced evaluation partner from a country receiving USAID assistance to conduct a mid-term evaluation of its global positive youth development and implementation research activities. The evaluation partner will collaborate with IREX to conduct the mid-term evaluation, which will be a performance evaluation with the main goals of identifying Youth Excel’s progress towards its intermediate outcomes and determining key lessons learned, which will inform course-corrections and/or adaptations for the remaining years of project implementation. One award is available for up to \$250,000 for 6 months from October 2022 to March 2023. This opportunity is open to local or locally established organizations based in countries receiving USAID assistance that have capacity and experience in qualitative research, including youth-led participatory approaches, and Youth Excel technical areas, interventions, and geographic regions; and youth-led participatory approaches. Please see full information in the following Request for Applications.

*Issuance of this request for applications does not constitute an award commitment on the part of Youth Excel, nor does it commit Youth Excel, IREX, or USAID to pay for costs incurred in the preparation and submission of an application. The application is submitted at the risk of the applicant. All preparation and submission costs are at the applicant's expense.*

Commented [RS1]: [@Kavla Caldwell](#), [@Frank Cheg](#), perhaps we should also expand this to include LEPS (locally-established organizations) based on the NPI definition. I think that this would open the field further. OK?



## Contents

1. What type of award is available?	3
2. What is the purpose and scope of the mid-term evaluation?	4
Program Background, Approach and Activities	4
Purpose, audience, and usage of the Midterm Evaluation	8
Key Evaluation Questions	8
Data Collection and Analysis Guidelines	10
Evaluation Team Profile and Required Competencies	12
Deliverables, Timelines and Logistics	14
3. Who can apply to conduct the mid-term evaluation?	18
4. How can you apply to conduct the mid-term evaluation?	20
5. How will the mid-term evaluation partner be selected?	20
Annex 1. Application Template	23
Annex 2. Key Terms	27

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### 1. What type of award is available?

- **Purpose:** conduct a mid-term evaluation to identify Youth Excel’s progress towards intermediate outcomes and determine key lessons learned.
- **Location:**
  - The mid-term evaluation partner must be a local or locally established organization (see definitions in Section 3) based in a country receiving USAID assistance (see full list in Section 3).
- **Number:** 1. Subject to the availability of funds, Youth Excel reserves the right to fund any or none of the applications submitted.
- **Type:** Fixed amount subaward. Payments set based on the negotiated budget will be made upon successful completion of project milestones. [ADS Reference 303mat](#) Mandatory Standard Provisions for Fixed Amount Awards to Non-Governmental Organizations apply.
- **Amount:** Up to USD \$250,000 is available. Applicants can propose the amount required within this range and will be selected using best value principles. Cost share is not required. Cost restrictions include:
  - Ineligible commodities per [ADS 312](#), including: military equipment, surveillance equipment, commodities, or equipment for the support of police or other law

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Commented [RS4]: See note above on adding LEPs

- enforcement activities, abortion equipment and services, luxury goods, gambling equipment, weather modification equipment.
- Restricted commodities per [ADS 312](#), including: agricultural commodities, motor vehicles, pharmaceuticals, contraceptives and condoms, pesticides, used equipment, fertilizer.
- Unallowable costs per [2 CFR 200 Subpart E](#), including: alcoholic beverages, bad debts, contributions and donations, fines and penalties, fundraising, lobbying, and other costs that are not allowable, reasonable, and allocable to the project.
- **Duration:** October 2022 to March 2023.
- **Length:** 6 months.

## 2. **What is the purpose and scope of the mid-term evaluation?**

### Program Background, Approach and Activities

#### Project Background

USAID’s recognition of youth’s role in development, through its Youth in Development 2012 policy and investments in mechanisms that deepen youth focused, and youth-led research, have strengthened positive youth development (PYD) programming. However, significant gaps still exist between youth, youth-led/youth-serving organizations and groups (YL/YSOGs), and policymakers, donors, and implementers. Long-standing barriers prevent youth from impacting local, national, and global development agendas. This includes adult-led systems that reinforce power differentials, lack of evidence on effectiveness, cost-effectiveness, and impact of PYD programming, which itself suffers from a lack of information on what works, and lack of youth capacity for research and to expand PYD programs.

To address and overcome these barriers, IREX’s Our Knowledge, Leading Change consortium and USAID have joined forces to implement the Youth Excel activity. Youth Excel will strengthen youth-led local development by building capacities of youth-led and youth-serving groups to conduct quality implementation research (IR) and strengthen local systems through intergenerational dialogue for collaborative learning, advocacy, and partnerships with diverse stakeholders. By systematically addressing these barriers and creating opportunities for diverse youth to build capacity; access flexible funding; connect and learn with peers and adult decision-makers; and leverage, synthesize, and disseminate learning locally and globally, Youth Excel (YE) can seize this extraordinary moment to support youth, YL/YSOGs, and youth-led networks’ (YLN’s) impact on youth programming and policy worldwide.

Youth Excel activity is being implemented under cooperative agreement No. 7200AA20CA00024 by IREX and the *Our Knowledge Leading Change* consortium. Youth Excel is a five-year global program with a ceiling of \$30 million. Led by IREX, Youth Excel consortium partners include Afrika Youth Movement, Ashoka Youth Venture, Root Change, Search for Common Ground, Tech Tribes, The Biz Nation, ABAAD, University of Minnesota, and UNOY-

**Commented [RS5]:** This scope is really lengthy. What about making it an Annex?

**Commented [FC6R5]:** It’s a bit tricky to balance the need for keeping the RFA short and to provide sufficient detail that will reduce the number of questions we’ll have to answer from bidders. I’ve removed some of the content that was there earlier, and moved some e.g. Glossary, to the Annexes

**Commented [RS7R5]:** Ok, noted thanks



Peacebuilders. Youth Excel is a global award with country-specific and regional activities in fourteen countries and four regions, globally as of July 2022. Youth Excel works with over 25 subgrantees and has also supported over 50 grassroots CSOs to date. The program is a \$30m award with \$15m allocated to core funding and \$15m allocated to buy-ins. Discrete activities are implemented under core funding and buy-ins. Youth Excel falls under USAID’s New Partnership Initiative (NPI) and is required to channel at least 50% of its funds to local and locally established partners.

Commented [FC8]: I've added this paragraph that was in the approved SOW. Can be removed if deemed unnecessary

### Program Goals and Objectives

Figure 1. Youth Excel Results Framework



### Program Activities

To achieve these goals and outcomes and subsequently elevate and sustain youth-led development, Youth Excel’s main activities include, (i) co-creating a gender-responsive PYD IR toolkit; (ii) catalyzing youth-led, issue based networks to use IR to tackle cross-sectoral challenges while building capacity in IR and digital leadership and advocacy skills; (iii) strengthening youth researcher networks; (iv) facilitating inclusive youth-adult data summits, (v) providing models for aligned intergenerational collaboration; (vi) deepening engagement and commitment by the public and private sector in youth-led research and learning; (vii) disseminating learning and evidence broadly; (viii) co-creating collaborative advocacy agendas; and (ix) linking youth to global platforms while iteratively learning and adapting our approaches.

Youth Excel is drawing each of these models and resources together through four Core funding activities and Buy-in activities as described below.



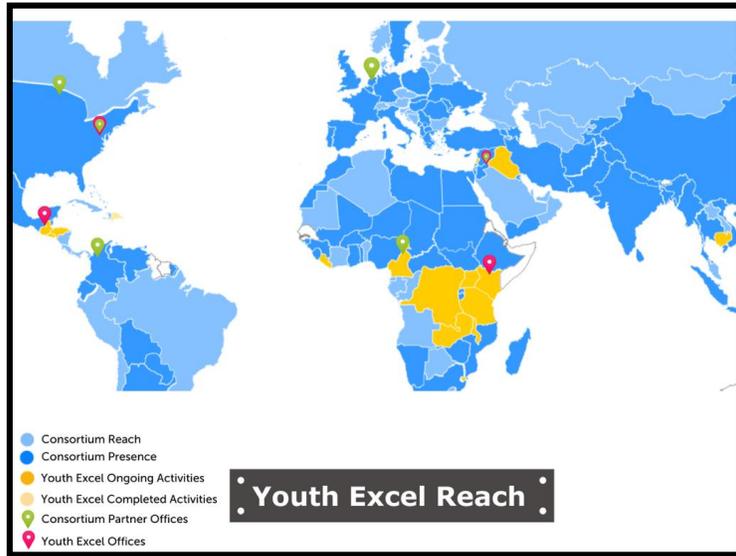


- 1. Issue-Based Collaborative Networks (ICONS):** ICONs are a place-based, whole-system-in-the-room collaboratives, convened to collaboratively tackle a shared problem and goal and leveraging members' work and assets. Each ICONs work iteratively to address a shared cross-sectoral issue.
- 2. Regional Grant Competitions:** Youth Excel's grant competitions are funding opportunities for local youth-led and youth-serving organizations to assess and adapt solutions for a cross-sectoral problem in a regional context through youth-led "research-for-change" approaches for positive youth development. The grant competitions offer \$25-75K subawards for 3-5 winners each. Successful grantees will implement projects over 6-12 months and participate in learning events and a data summit.
- 3. Local consortium partner implementation research activities:** Our local partners design and implementation research activity, collaboratively designed with IREX, and funded through their individual subaward.
- 4. Youth Digital Leadership Toolkit:** Youth Excel is creating a youth digital leadership toolkit as a stand-alone offering and will integrate youth digital leadership modules into each activity as appropriate. To provide reach, efficiency, and sustainability, Youth Excel is developing a partnership with UNICEF's Learning Passport platform.
- 5. Buy-ins:** USAID Missions/Bureau develop activities/programs specific to their countries, but aligned with Youth Excel's goals, objectives, and approaches.

### Program Results Summary

Through the past 22 months of activity implementation (i.e., October 2020 to July 2022) the YE program has worked with more than 70 partners across 14 countries, to directly reach more than 1200 youth participants, globally. These 70 partner organizations in turn serve over 350,000 youth annually. The map below shows the YE program's reach, including our current and previous activity locations





The table below shows the number of different partners YE has, their regional locations, and which of the five core program activities they are engaged in;

Figure 3; Distribution of YE partner organizations across global regions

Regions/Partner Types	Consortium Partners	Small Grant Winners	ICON Anchor Partners	ICON Participants
Africa	2	4	3	31
Global	4			
LAC	1	5	1	10
MENA	2		2	13
<b>Total</b>	<b>9</b>	<b>9</b>	<b>6</b>	<b>54</b>

**Commented [RS9]:** This is incorrect, please double check a report or with Hafez. I think it's 18 or 19. Can you also add rows for totals?

**Commented [FC10R9]:** Done. The actual figure is 10 organizations and 3 individuals

The following table below shows the specific countries where our Core and Buy-in activities are currently being implemented across the globe;

Figure 4; YE project activities and locations summary

Project Activity	Countries of Implementation
<b>Consortium Activities</b>	Cameroon, Democratic Republic of Congo, El Salvador, Dominican Republic, Iraq-Kurdistan, Jordan, Kenya



<b>Grant Competitions</b>	El Salvador, Eswatini, Guatemala, Honduras, Kenya, Uganda Zambia
<b>ICONS</b>	Democratic Republic of Congo, Guatemala, Iraq-Kurdistan, Kenya
<b>Buy-Ins</b>	Democratic Republic of Congo, Tanzania, Malawi, Zambia, Cambodia. <i>Liberia to be initiated in Q4.</i>

### Purpose, audience, and usage of the Midterm Evaluation

The MTE will explore progress made towards achieving the Youth Excel program goals and outcomes. The evaluation will provide Youth Excel (including IREX, consortium partners, and USAID) an understanding of YE project achievements, strengths, and weaknesses. It will provide a comprehensive opportunity to gain experience from the work to date, and to use the lessons learned to guide the project in reviewing and revising the strategy for the remaining half of the program's life. The evaluation will assess the extent to which program outcomes are being realized, capture lessons learnt, build on experience, and make recommendations that are responsive to consortium partners' needs to ensure better achievement of outcomes in the remaining period of the implementation. The MTE's analytical framework will be structured according to the [OECD-DAC Criteria for Evaluation](#) (Relevance, efficiency, effectiveness, and sustainability), and the resultant report will be a crucial learning document that will be shared broadly with the IREX team, USAID, consortium partners, the Global Youth Advisory Council (GYAC), anchor partners, and YL/YSO partners. The MTE's audience shall also include the youth who Youth Excel has worked with, as a way to feed back to them, and hold us accountable. The evaluation will be designed and implemented by an external evaluation partner, supported by IREX and the consortium partners where necessary and possible.

### Key Evaluation Questions

The following illustrative evaluation questions have been identified as key learning questions to guide the MTE. *(The actual final evaluation questions may differ from these, depending on deliberations between the successful bidder and the YE team)*

1. How effective and inclusive are YE approaches in achieving results in the TOC? Which elements of the project strategy require modification to enhance the project's effectiveness within IREX and at the consortium partner level? Specifically:
  - i. To what extent have YE's main activities (i.e., ICONs, Grant Competitions, IRGPAs, Buy-Ins and Knowledge Products) improved YL/YSO's inclusive PYD programs, and which types of activities resulted in which types of change?
  - ii. To what extent have YE's main activities contributed to strengthening local systems (including strengthened youth-inclusive policy and practice; elevated role of youth





organizations; strengthened relationships between youth organizations and multi-sectoral actors, etc.)?

- iii. To what extent have processes and activities within YE been youth-led? This should include an examination of governance structures, project management, ICONs, Regional Grant Competitions, Local Consortium Partner Activities, Youth Digital Leadership Toolkit and Buy-ins.
  - iv. To what extent have YE activities (around protection and GESI) strengthened the safety and inclusivity of YL/YSO programs- for implementers and participants? (For the YL/YSO staff and volunteers as well as for their constituencies/communities)?
2. What are some ways to enhance innovation and improve performance of the YE program in different sectors and geographies?
  3. To what extent are YE stakeholders (YS/YLO leaders, members, and adult allies) able and willing to use IR findings to adapt programming, raise awareness on key issues facing the youth, and/or engage in policy debates? Why?
  4. To what extent are the YS/YLOs leaders, members, and adult allies supporting local organizations adopting 'cultures of learning'? What adaptations might improve this?
  5. What changes to risk assessment (including protection risk assessments) and contextual monitoring should be made to maximize learning about the TOC for the benefit of USAID, IREX, and future youth-led development efforts?

Additional learning questions as outlined in the program's CLA plan may be considered for integration with the key evaluation questions outlined above. These program level learning questions are summarized in the illustration below.



- 1 What IR methodologies, domains, approaches, and research questions are most useful to and used by YL/YSOs in diverse contexts; and how do YL/YSOs define 'useful' and 'used'? To what extent does an IR approach empower local ownership and usage of knowledge?
- 2 What approaches to inclusive intergenerational dialogue and engagement are most effective in shifting power so that diverse local youth shape development policy and resource allocation?
- 3 How do networks improve (accelerate, strengthen, or make more inclusive) impact for youth and communities?
- 4 What approaches are most effective in strengthening YL/YSO's performance?
- 5 What knowledge mobilization and dissemination strategies best support sustainable knowledge production and intergenerational dialogue, and feed back into programming to help shape policies and norms in diverse contexts?

### Data Collection and Analysis Guidelines

Youth Excel proposes consideration of the general data collection methods outlined below, but the external evaluator is expected to propose other detailed data collection methods that will generate the highest-quality and most credible evidence for each proposed evaluation question with considerations of the timeline, budget, and other practical issues. At a minimum, we require that prospective bidders propose participatory and youth-inclusive research methodologies (where possible), for both the data collection and analysis processes, in line with the YE program approach. All evaluation activities must also abide by the following set of operating principles:

- i. Evaluation activities will align with Positive Youth Development (PYD) and Gender and Social Inclusion (GESI) practices and principles
- ii. Evaluation activities are integrated and designed to enhance participants' experience in project activities, such as by providing opportunities for reflection, feedback, and learning
- iii. Evaluation results are packaged and disseminated in ways that can support learning by different audiences

**General Approach.** The successful evaluation team will be required to propose a detailed evaluation plan and approach, based on the information provided in this SOW. The evaluation should include both qualitative and quantitative, primary data collection and analysis, and secondary analysis of all existing data (e.g., activity monitoring data). Primary data may be collected through surveys, structured interviews, semi-structured interviews, and focus group discussions (FGDs) held with the YE beneficiaries, the project implementation team,

implementing partners' (IPs) staff, including any other stakeholders involved in the project. Other groups of non-YE participants will also be included in the sample frame to gather perspectives of outsiders related to project implementation and relevance.

**Data Collection and Analysis.** The specific data collection methodology will be designed around an assessment matrix consisting of evaluation issues grouped by the evaluation questions, with each question providing guidance on the information to be collected, source of information, tools for collection, and methods for analysis of data once they have been collected. Interested bidders should review the proposed methods, and where necessary, propose revisions with reasons and any impact this might have on the evaluation, especially how it can enhance the results

Primary data collection – through a hybrid remote and/or in person approach that will be agreed upon between YE and the successful bidder - will be facilitated first by the field agents (Refer to the section on desired team profile for details), including focus group discussion facilitators, interviewers, and notetakers. These personnel should ideally be accompanied by technical specialists who will observe data collection in the field and provide guidance and direction when necessary<sup>1</sup>. Transcripts and translations will be conducted by field agents fluent in all YE languages, and qualitative data analysis for these primary data will be conducted by technical specialists.

Where possible, considering YE's global presence and nature of activities, prospective bidders should clearly outline what their general approach to the deployment of field agents in support of the MTE would be (This could include descriptions of how they have approached similar tasks, or a detailed description of their global presence, or that of their partners, in the YE countries of interest). The successful bidder will work together with the YE program team and IPs to refine plans for the deployment field staff to lead and/or support all data collection activities, in each of the locations where in-person data collection will be deemed necessary and feasible.

**Qualitative** data analysis will involve coding of qualitative data once they have been transcribed and translated to identify trends of common themes both within and across the broad evaluation issues in the abovementioned matrix as well as any other thematic areas relevant to the YE project activities and results. **Quantitative** data analysis will involve analyzing primary and secondary program monitoring and implementation data to establish the extent to which program implementing goals and targets are being reached, as well as ongoing outcome indicators for certain project objectives where this is appropriate and possible.

**Other Key Considerations.** It is essential to consider the current security contexts in the YE areas of operation. Care should be taken when selecting study sites and planning evaluation activities to mitigate security risks for both the evaluation team and the respondents.

<sup>1</sup> Through a consultative process, the successful bidder and the YE team will determine which locations and partners will be sampled and interviewed via remote or in person processes

**Commented [RS11]:** To we need to specify how many in person vs virtual/remote data collection efforts we expect?

**Commented [FC12R11]:** This would ideally be part of the discussions with the successful bidder due to the cost implications. At a minimum, we could suggest that all countries where we had ICONs activities, there should be a qualitative process e.g. FGDs with the youth participants, then everything else is evaluated remotely. But this could be complicated in places like Iraq, DRC. So its a bit hard at this stage to prescribe data collection approaches

**Commented [RS13]:** To me, this says we need to give more info about where our activities are, what types, etc.

**Commented [RS14R13]:** So a list of countries with different types of activities.

**Commented [FC15R13]:** Agreed.



Contingency plans should be developed in case one or more evaluation activities need to be modified, abandoned, or rescheduled due to the evolving security situation. The security context should also be integrated into the evaluation framework, as this context has a marked effect on project implementation, outcomes, and impacts.

It is also essential to consider the impacts of the ongoing COVID-19 pandemic on implementation of project activities and achievement of outcomes and impacts. Potential impacts on the sampled participants should also be considered, including health impacts, economic impacts at the local, national, and international scales, and impacts on ability to travel and attend group meetings and project activities. The evaluation team must endeavor to observe strict Covid-19 protocols in all their interactions with respondents during FGDs, and KIs (Key Informant Interviews), and generally when interacting with stakeholders and research subjects in the field. This includes social distancing, thorough handwashing, proper sanitation, and wearing masks when indoors.

### Evaluation Team Profile and Required Competencies

#### Team Profile

The successful evaluation team will consist of a team leader who is an evaluation specialist, plus three to five technical specialists who bring expertise and practical experience in one or more of the YE activity's technical areas, interventions, and geographical regions, in addition to strong qualitative research skills and experience. Teams having a background in supporting youth leadership, conducting youth-led research, and including youth evaluators are preferred. The team will also include a data analyst experienced in analyzing and relating data across various interventions.

#### Roles and Responsibilities

**Team Leader:** Will organize and lead the overall evaluation; ensure a thorough review and analysis of activity monitoring data and other available secondary data by the appropriate team members; lead the selection of a purposively selected sample of implementation sites and outputs for primary data collection; ensure that the protocol and tools are contextually appropriate for each selected location and target group; ensure an evaluation plan that includes adequate triangulation and validation of evidence collected in all sectors; lead the collection and analyses of primary and secondary data to evaluate the activity's M&E processes and the integration of activity sectors and interventions; ensure that final report presentation is logical and presented in a way that clearly separates the evidence collected, conclusions, and recommendations in different sections of the report, and conclusions and recommendations are based only on the evidence presented in the report; lead writer who ensures the evaluation report is written clearly and concisely, organized and has a uniform voice; interact, on the part of the evaluation team, with YE and USAID; and serve as a technical specialist for the youth sector.



**Technical Specialists:** Lead the collection and analyses of primary and secondary technical data related to his/her field(s) of expertise, document findings, draw conclusions, and form recommendations for the sector(s) and/or contexts; evaluate the general aspects of the implementation of all interventions related to his/her sector(s). While the team leader will likely be tasked as the primary investigator for the activity management overall, a technical specialist must consider management aspects of the implementation of interventions in his/her technical sector and the interaction between his/her technical sector and other activity sectors by examining: (i) staff and material resources; (ii) communication, both internal and external; (iii) community involvement; (iv) participant targeting; (v) partnerships and linkages; (vi) consortium management; (vii) routine monitoring and data quality assurance for all interventions; (viii) exit/sustainability strategies; (ix) gender integration; (x) protection; and draft the report sections assigned by the team leader in the specified format.

**Field Agents.** Where possible, considering YE's global presence and nature of activities, prospective bidders should clearly outline what their general approach to the deployment of field agents in support of the MTE would be (This could include descriptions of how they have approached similar tasks, or a detailed description of their global presence, or that of their partners, in the YE countries of interest). The successful bidder will work together with the YE program team and IPs to refine plans for the deployment field staff to lead and/or support all data collection activities, in each of the locations where in-person data collection will be deemed necessary and feasible. These agents should be locally sourced, with sufficient practical experience in primary data collection for activities similar to or related to this proposed MTE. Engagement of youth researchers is required.

#### Minimum Requirements for Team Lead and Technical Specialists

- i. Every team member's resume must show substantial application of qualitative research skills in developing countries.
- ii. The team leader must have significant formal education in a field relevant to evaluation (e.g., program evaluation, statistics, economics, agricultural economics, anthropology, applied research, organizational development, sociology, or organizational change) at a post-graduate or an evaluation professional continuing-education level.
- iii. The team leader must have experience in evaluation using mixed methods of investigation (qualitative and quantitative) in developing countries.
- iv. Knowledge of the PYD framework and experience evaluating youth programs and using youth-friendly participatory approaches are required.
- v. Each technical specialist should have a post-graduate degree in a field related to at least one of the technical sectors of the activity, plus extensive practical experience in developing countries with interventions like those implemented by the YE program.
- vi. The specific areas of expertise required of the technical specialists include (at a minimum) education, youth economic opportunity, youth civic engagement, peacebuilding, positive

**Commented [RS16]:** To me, this says we need to give more info about where our activities are, what types, etc.

**Commented [RS17R16]:** So a list of countries with different types of activities.

**Commented [FC18R16]:** Agreed.

**Commented [FC19]:** [@Rachel Surkin](#) I refined the language here to indicate that primary field data collection will be determined after we select the bidder, BUT they should provide a general description of how they have/will approach deployment of field agents if required.



- youth development programming, GESI, and Protection. At least one member of the team must have substantial demonstrated experience in gender and social integration in programming.
- vii. No member of the team should have had any prior input to the activity's design or implementation.
  - viii. Knowledge and experience with reviewing ToC (Theory of Change) and Logframe is highly desired.
  - ix. The team must incorporate youth researchers at every level of the MTE
  - x. The team must incorporate members with fluency in English and Spanish, which are the main working languages for YE's implementing partners globally. (French and/or Kurdish languages experience will be considered a plus.)

### Deliverables, Timelines and Logistics

#### Deliverables

The following deliverables will be required for submission to YE by the evaluation partner. USAID evaluation policy requires that the report describe the strengths and limitations of the evaluation methods and how and to what degree these factors influenced the process and findings of the evaluation. Additionally, the report must clearly separate in different sections the evidence (i.e., raw data) collected by the evaluation team, the conclusions and recommendations that are based on the presented evidence. Sources of all evidence must be identified, conclusions must be based only on evidence presented in the report, and recommendations must directly correspond to the conclusions. The final report must adhere to the requirements in the USAID Evaluation Policy. Once approved by the AOR, the firm must submit the report, supporting documents, and related data sets to YE in time for submission to USAID within 30 days.

The main deliverables anticipated from this exercise are therefore as follows:

- i. Inception report
- ii. Draft evaluation plan – including background and significance, context, methods, a description of the sample frame and sampling procedures, potential strengths and weaknesses of the study, a timeline, and a budget with an accompanying budget narrative.
- iii. Final evaluation plan
- iv. Sense-making workshop - for sharing of initial findings from the field prior to drafting the main report
- v. Draft evaluation report – including sections for context and background, materials and methods, results, discussion, and recommendations.
- vi. Final evaluation report



- vii. Executive summary of final evaluation report – the executive summary should be submitted along with the draft evaluation report
- viii. Presentation for USAID
- ix. Presentation for YE staff, participants, and partners
- x. Primary datasets – should include recordings of interviews and focus group discussions on transcriptions / translations into English, as well as transformations of these datasets for use in qualitative analyses
- xi. Data collection instruments in English, Spanish, Kurdish and French (As applicable)
- xii. Description of data analyses and results
- xiii. List of sites visited/sampled with types and numbers of informants at each study location

### Tentative Timelines

Deliverable	Proposed Timeline
Inception meetings between the successful bidder and the Youth Excel/USAID team members	Week one
Desk review and inception report submission	Week 1 to 3
Study Design	Week 3 to 7
Field coordination Planning	Week 7-11
Tools design, translation, and piloting	Week 7-11
Field and remote data collection	Week 12-17
Sense-making workshop	Week 18
Draft report preparation and submission	Week 19-22
Draft report review and feedback from IREX	Week 22-24
A final report that includes all elements described in USAID ADS 201 <sup>2</sup>	Week 25
Datasets—and supporting documentation such as code books, data dictionaries, scope, and methodology used to collect and analyze the data—to be submitted to IREX Youth Excel and the USAID Development Data Library	Week 25

<sup>2</sup> The Midterm Evaluation report must meet the criteria outlined in [Criteria to Ensure the Quality of the Evaluation Report](#) (USAID ADS Chapter 201).



### **Pertinent Permissions, Approvals, Insurance, and Other Required Permits**

The evaluation team will be responsible for obtaining all necessary permissions, approvals, insurance, and other required permits and for adhering to national and local formalities. These include required permits related to data collection from human subjects, including necessary internal review board approvals and health and accident insurance for the evaluation team members. The evaluation team shall also obtain the informed consent of all informants and participants interviewed

### **YE Staff and Implementing Partners Participation**

The Midterm Evaluation will be conducted by an external evaluation team and will be supervised by the YE Global MEL (Monitoring Evaluation and Learning) Advisor, with support from the YE Consortium Lead, advised by the USAID MEL Specialist, and supported by the YE Consortium Activity Managers, the GYAC, and Partner MEL Leaders/Focal Points from the program's technical MEL Working Group, with regular engagement and feedback loops to our youth participants. The YE Global MEL Advisor will lead the drafting of the SOW, in close consultation with the YE Program Team and the Consortium members (MEL Working Group and Learning/Oversight Committee). The draft SOW will be shared with the USAID AOR and MEL Specialist for review and approval before external dissemination. Consortium partners will also be engaged to support the dissemination of the SOW to potential bidders within their networks and/or geographical areas of operation. The YE Program team and consortium members and other implementing partners will also be engaged as key sources of data, where deemed necessary by the evaluators.

### **Expected period of performance**

October 2022 – March 2023

### **Scheduling, coordination, and other support**

The successful evaluation team is responsible for any technical deficiencies. Therefore, it will have to hire available personnel with human and professional qualities and be able to provide its agents with all the necessary technical, logistical, and administrative support. The evaluation team will be responsible for covering all risks of illness and accidents of any kind. Every member of the evaluation team must adhere to ethical guidelines as outlined in the American Evaluation Association's Guiding Principles for Evaluators. A summary of these guidelines is provided below.

- *Systematic inquiry:* Evaluators conduct systematic, data-based inquiries.
- *Competence:* The evaluation team possesses the education, abilities, skills, and experience appropriate to undertake the tasks proposed in the evaluation. Evaluators practice within the limits of their professional training and competence and decline to



conduct evaluations that fall outside those limits. The evaluation team collectively demonstrates cultural competence.

- *Integrity/honesty*: Evaluators display honesty and integrity in their own behavior and attempt to ensure the honesty and integrity of the entire evaluation process.
- *Respect for people*: Evaluators respect the security, dignity, and self-worth of respondents, activity participants, clients, and other evaluation stakeholders. Evaluators regard informed consent for participation in evaluation and inform participants and clients about the scope and limits of confidentiality.
- *Responsibilities for general and public welfare*: Evaluators articulate and consider the diversity of general and public interests and values that may be related to the evaluation.

**Provision of Secondary Data.** YE will provide the evaluation partner with the following sources of secondary data to be used for conducting secondary quantitative analysis, and to provide context for the primary qualitative data that will be collected by the team

- i. YE Program overview and locations of implementing partners
- ii. YE Detailed Implementation Plans for the first two years of the program.
- iii. YE Proposal and program description
- iv. YE Annual and Quarterly Reports from the beginning of the program to the present
- v. YE Log Frame
- vi. YE Theory of Change
- vii. YE Baseline analysis data and report
- viii. YE DQA Reports

These materials will be provided to the evaluation partner at the beginning of the contract, and additional materials will be provided during the evaluation period as they become available.

**Other Resources:** YE will provide the following resources to the evaluation team:

- i. Lists of intervention sites, identifying the type(s) of interventions at each location, with start dates of implementation, numbers of direct participants etc.
- ii. Approved activity proposal narrative and relevant attachments with documentation of approved modifications.
- iii. Baseline study report and reports from all research conducted for the activity's benefit (e.g., formative research, gender analyses).
- iv. A current organogram of activity staff (with names and phone numbers for incumbents and notation of vacancies) showing partner organization and supervision/management lines.
- v. Intervention implementation protocols and guidelines and identification of activity staff who use each.
- vi. Descriptions, dates, and numbers of participants of capacity building activities for partner staff and activity participants



- vii. Complete AMELP, including monitoring tools, manuals, and reports; Examples and lists of recipients of all types of M&E reports.
- viii. Activity monitoring databases.
- ix. Descriptions of the nature (e.g., format, location) and contents (e.g., type of data, period of collection) of the various data sets that YE will provide for the evaluation.
- x. All relevant reports; Monthly, Quarterly, Annual Report, and Annual Performance Reports

**Logistical and Administrative Advice and Support.** YE will provide the following types of support to the evaluation team:

- 1) Arrange meetings between the evaluation team and USAID, at a minimum at the beginning and end of the evaluation process.
- 2) Provide contact details for key partners' staff.
- 3) Provide administrative support: communication, photocopying, printing, etc.
- 4) Advise about local protocols and permissions to gain entry to operational areas.
- 5) Provide advice and support related to travel
- 6) Identify local firms with potential to provide technical expertise, to the evaluation team

Any items not covered by the above list fall under the responsibility of the evaluation team and need to be managed as such.

### 3. Who can apply to conduct the mid-term evaluation?

The request for applications is open to local or locally established organizations based in a country receiving USAID assistance that meet the following minimum criteria and share Youth Excel objectives. Organizations led by and serving youth, including those from marginalized groups which may include age, gender, disability, ethnicity, and other identities, are encouraged to apply. The award will be made to a single recipient organization.

“Local entity:”<sup>3</sup> an organization that:

- Is legally organized under the laws of a country that is receiving assistance from USAID;
- Has its principal place of business or operations in a country receiving assistance from USAID;
- Is majority-owned by individuals who are citizens or lawful permanent residents of a country receiving assistance from USAID; and
- Is managed by a governing body, the majority of whom are citizens or lawful permanent residents of the country receiving assistance from USAID.

<sup>3</sup> Definition per [ADS 303.6](#).

**Commented [FC20]:** Is there a way to work around this? If we want a single recipient organization that is not international or not part of a consortium, to work across multiple countries, may create complications E.g. in Cases where in-person data collection approaches are deemed most ideal, a local organization may struggle in getting work/research permits or identifying personnel to undertake such a data collection activity.

**Commented [RS21R20]:** Couldn't a single organization be responsible for hiring and managing a group that does data collection in another place or places?

**Commented [FC22R20]:** Correct. I am not sure what the 'International Organization' ineligibility actually covers, hence my question. E.g. Would a Consulting Firm with multiple offices globally fall under this or under the 'Private Organization' group?



“Locally Established Partner (LEP):”<sup>4</sup> A U.S. or international organization that works through locally led operations and programming models. LEPs:

- Have maintained continuous operations in-country for at least five years and materially demonstrate a long-term presence in a country through adherence or alignment to the following:
  - Local staff comprises at least 50% of office personnel;
  - Maintenance of a dedicated local office;
  - Registration with the appropriate local authorities,
  - A local bank account; and
  - A portfolio of locally implemented programs.
- Have demonstrated links to the local community, including:
  - If the organization has a governing body or board of directors, then it must include a majority of local citizens;
  - A letter of support from a local organization to attest to its work; and
  - Other criteria that an organization proposes to demonstrate its local roots.

Eligible	Not Eligible
<ul style="list-style-type: none"> <li>• Legally registered, local or locally established country in an eligible country.</li> <li>• <b>Eligible countries:</b> Afghanistan, Albania, Angola, Armenia, Azerbaijan, Bangladesh, Belarus, Benin, Bosnia and Herzegovina, Botswana, Brazil, Burkina Faso, Burma, Burundi, Cambodia, Cameroon, Chad, Colombia, Côte d'Ivoire, Democratic Republic of the Congo, Djibouti, Dominican Republic, Eastern and Southern Caribbean, Egypt, El Salvador, Ethiopia, Georgia, Ghana, Guatemala, Guinea, Guyana, Haiti, Honduras, India, Indonesia, Iraq, Jamaica, Jordan, Kazakhstan, Kenya, Kosovo, Kyrgyz Republic, Laos, Lebanon, Liberia, Madagascar, Malawi, Maldives, Mali, Mauritania, Mexico,</li> </ul>	<ul style="list-style-type: none"> <li>• Unregistered organization, group, or individual</li> <li>• Internationally based and led organization</li> <li>• Consortium of multiple organizations</li> </ul>

Commented [RS23]: Add LEP definition?

<sup>4</sup> Definition per [ADS 303.6](#).

Moldova, Morocco, Mozambique, Namibia, Nepal, Nicaragua, Niger, Nigeria, North Macedonia, Pakistan, Panama, Paraguay, Peru, Philippines, Rwanda, Senegal, Serbia, Sierra Leone, Somalia, South Africa, South Sudan, Sri Lanka, Sudan, Tajikistan, Tanzania, Thailand, Timor-Leste, Tunisia, Uganda, Ukraine, Uzbekistan, Vietnam, West Bank and Gaza, Zambia, Zimbabwe

- Non-governmental or private organization
- Eligible to receive USAID funding:
  - Able to obtain [Unique Entity ID](#)
  - Able to sign [ADS 303mav](#) Certifications, Assurances, Representations, and Other Statements of the Recipient

- Government institutions
- Not eligible to receive USAID funding:
  - Appears on Treasury Department's Office of Foreign Assets Control list
  - Appears on United Nations Security Designation list
  - Has active exclusions, debarment, suspension, or ineligibility in the System for Award Management

#### 4. How can you apply to conduct the mid-term evaluation?

Provide responses in English to the application questions and the required attachments in Annex I.

Submit application online by **August 22, 2022, at 23:59 GMT** here: [https://irexorg.formstack.com/forms/fy23\\_youth\\_excel\\_evaluation\\_01](https://irexorg.formstack.com/forms/fy23_youth_excel_evaluation_01)

Commented [FC24]: The correct link needs to be provided

*IREX reserves the right to accept late and incomplete applications when it is in the best interest of Youth Excel objectives; otherwise, late, and incomplete applications will be automatically disqualified.*

#### 5. How will the mid-term evaluation partner be selected?

- 1) Eligibility screening: An IREX grants team will conduct an initial review of the applications, based on the following eligibility requirements, and disqualify applications that are not eligible for consideration.
  - Does application satisfy the basic parameters of the RFA?

- Does the application fulfill the eligibility criteria?
  - Is the application complete and submitted on time?
- 2) Shortlisting: An IREX technical team will conduct a merit review of all eligible applications, based on the selection criteria.
  - 3) Finalist Selection: The Youth Excel review panel, comprised of IREX and partner staff, Global Youth Advisory Council members and other youth representatives, and USAID staff will use the selection criteria to select finalist(s) based on the following criteria:

Criteria	Description	Weighting
<b>Technical Approach / Methodology</b>	<ul style="list-style-type: none"> <li>• Extent to which the proposed approach is responsive to the desired outcomes</li> <li>• Understanding of the prioritization and sequencing of activities and tasks, feasibility of proposed timelines.</li> </ul>	30
<b>Cost/Price</b>	<ul style="list-style-type: none"> <li>• Overall costs proposed are realistic for the work to be performed.</li> <li>• Costs reflect the applicant's understanding of the requirements and are consistent with the technical application.</li> <li>• Costs are reasonable, allocable, and allowable.</li> </ul>	25
<b>Institutional Capacity and Past Performance</b>	<ul style="list-style-type: none"> <li>• Bidder has requisite depth of experience managing tasks of similar scope, magnitude, and complexity.</li> <li>• Bidder has experience of delivering similar work in similar contexts/countries.</li> </ul>	25
<b>Quality of key personnel for the assignment</b>	<ul style="list-style-type: none"> <li>• Key personnel demonstrate the requisite expertise, experience, language skills, other capabilities, and gender balance necessary to support the proposed technical approach, while remaining cost-effective.</li> </ul>	20



*Notifications to all applicants will be made to the point of contact who submitted the application. The selection of an application in accordance with these established criteria and processes does not guarantee an award. Awards are contingent on successful workplan-budget negotiations, risk assessment, and IREX and USAID approval.*





## Annex I. Application Template

A complete application includes responses in English to the following questions (Section A) and the technical proposal and attachments (Section B and C). An asterisk (\*) indicates that a response is mandatory; others are optional.

- Technical Proposal (Word or PDF, 10 pages maximum)
- Attachments
  1. Past Performance Information for three to five projects of comparable size and scope using Word template provided.
  2. Sample(s) of similar work if available.
  3. CV(s) of team lead (required) and technical specialist(s) (optional).
  4. Budget using Excel template provided.
  5. Budget narrative using Word template provided.
  6. Due diligence questionnaire using Word template provided and submitted as a signed PDF.
  7. Registration certificate.

Commented [KC25]: @Rosemary Mani could you please update the instructions on the cover page of the Formstack

You may draft responses in a Word document **OR** directly in the online form linked below, which enables you to save and resume your work as you go. You **MUST** submit your responses and attachments online here:

[https://irexorg.formstack.com/forms/fy23\\_youth\\_excel\\_evaluation\\_01](https://irexorg.formstack.com/forms/fy23_youth_excel_evaluation_01)

### A. Your organization:

Please provide the following information about your organization:

1. What is your organization's name?\*
2. Required: is your organization a local or locally established organization in an eligible country?\*
  - Yes: Please specify.
    - Local
    - Locally established
      - Please select country.
  - No
3. Required: is your organization legally registered in your country? \* This will be verified with the registration certificate in Attachment 7.

Commented [KC26]: @Rosemary Mani in the Formstack, you can select both "yes" and "no" - could you please adjust this. also, if you click "local," the dropdown list of countries doesn't appear, could you please add it.





- Yes
- No

4. Required: is your organization a non-governmental or private organization? \*

- Yes: Please specify.
  - Non-governmental
  - Private
- No

5. Not required: is your organization predominantly led by youth under the age of 35 years?\*

- Yes
- No

6. Please provide your organization's UEI (Unique Entity Identification) number if available.

7. Please provide links to your organization's website and social media pages if available.

8. Please provide a brief description of your organization. \* (500 characters)

9. What is/are the main youth demographic(s) that your organization focuses on? \* Please choose all that apply.

- Young Women
- Young Men
- Adolescent Girls
- Adolescent Boys
- Youth with Disabilities
- Youth from Indigenous Populations
- Youth from Marginalized Ethnic Group
- Youth from Marginalized Religious Group
- Youth Identifying as Lesbian, Gay, Bisexual, Transgender, Queer, and Intersex (LGBTQI+)
- Youth Affected by Crisis or Conflict
- Youth Living with HIV/AIDS
- Other: Please specify.

10. What is the approximate total number of youth participants that your organization has supported in the past year, across all your work? \* (Number)

Please provide breakdown by gender identity if available.

- Female: (number)





- Male: (number)
- Non-binary: (number)
- Choose not to disclose: (number)

11. What are the primary sectors that your organization currently focuses on? \* Please choose all that apply.

- Youth economic opportunity/youth livelihoods/employment
- Gender, inclusion, equity & girls/women's equality
- Youth mental health & psychosocial support
- Youth digital leadership, technology & innovation
- Youth civic or political engagement & advocacy
- Youth peacebuilding
- Education
- Reproductive Health
- Agriculture
- Environment and Climate Change
- Other: Please specify.

### B. Technical Proposal

Please submit a technical proposal not to exceed 10 pages in Word or PDF. It must include:

- Institutional Capacity Statement summarizing the organization's relevant experience.
- Management Approach summarizing the structure and qualifications of the evaluation team.
- Proposed Methodology. It must include approaches for the following:
  - Positive Youth Development
  - Gender Equality and Social Inclusion
  - Data Protection and Research Ethics
- Workplan including activities, deliverables, and timeline in a Gantt chart with narrative description.

Commented [KC27]: @Rosemary Manu could you please add a page break for this section of the Formstack, and a space to upload the technical proposal

### C. Attachments

Please upload the following attachments:

1. Past Performance Information for three to five projects of comparable size and scope using Word template provided.
2. Sample(s) of similar work if available.
3. CV(s) of team lead (required) and technical specialist(s) (optional).
4. Budget using Excel template provided.
5. Budget narrative using Word template provided.

Commented [KC28]: @Rosemary Manu could you please add 3 spaces for optional uploads

Commented [KC29]: @Rosemary Manu could you please add 1 spot for the required upload of the team lead CV, and 2 spots for optional uploads of other CVs





6. Due diligence questionnaire using Word template provided and submitted as a signed PDF.
7. Registration certificate.

#### D. Certifications

As an authorized signatory of the applicant organization, I certify that the information provided is complete and accurate, to the best of my knowledge. By signing this application, I authorize IREX to verify information. Any willful false statements in this application will be grounds for disqualification of application or termination of grant if issued.

Signature:

Name:

Title:

Phone Number:

Email Address:



## Annex 2. Key Terms

- **Capacity development:** an approach for youth-led and youth-serving organizations to strengthen skills and leverage opportunities in different areas.
- **Gender equality and social inclusion (GESI):** an approach that helps us to understand the importance of equal rights and opportunities for all individuals regardless of their social identity.
- **Issue-Based Collaborative Networks (ICONS):** ICONs are a place-based, whole-system-in-the-room collaboratives, convened to collaboratively tackle a shared problem and goal and leveraging members' work and assets. Each ICONs work iteratively to address a shared cross-sectoral issue.
- **International Research and Exchanges Board (IREX):** IREX is a global development and education organization. We strive for a more just, prosperous, and inclusive world—where individuals reach their full potential, governments serve their people, and communities thrive. IREX and its Our Knowledge, Leading Change consortium lead the Youth Excel program.
- **Intersectionality:** Interaction of an individual's identities (race, gender, disability status, age, and other aspects) in ways that can intensify the inclusion or exclusion they experience. Intersectionality is the understanding that a person may enjoy advantages, or suffer disadvantages, based on multiple identities rather than just one.
- **Intersectional Rapid Gender and Protection Analysis (IRGPA)**
- **Knowledge Mobilization:** an approach to creating and disseminating knowledge from your research-to-change process.
- **Knowledge Product:** a product for sharing learning and enabling the audience to act based on that learning from the research-to-change process.
- **Learning Goal:** a goal for information that you need to decide in the near future. Learning goals help your team to identify learning needs that will guide your research-to-change plan.
- **Local Organization:** an organization that is legally organized under the laws of a country that is receiving assistance from USAID; has its principal place of business or operations in that country; is majority-owned by individuals who are citizens or lawful permanent residents of that country; and is managed by a governing body, the majority of whom are citizens or lawful permanent residents of that country. This definition comes from [USAID's New Partnership Initiative](#) and [ADS 303.6](#).
- **Locally Established Organization:** A U.S. or international organization that works through locally led operations and programming models. LEPs: Have maintained

Commented [FC30]: The fonts and numbering styles used throughout the document should be made more consistent/uniform for easier reading

Commented [KC31R30]: Clotilda: move glossary to annex



continuous operations in-country for at least five years and materially demonstrate a long-term presence in a country through adherence or alignment to the following:

- Local staff comprises at least 50% of office personnel;
- Maintenance of a dedicated local office;
- Registration with the appropriate local authorities,
- A local bank account; and
- A portfolio of locally implemented programs.

Have demonstrated links to the local community, including:

- If the organization has a governing body or board of directors, then it must include a majority of local citizens (in the host country, this is not required);
- A letter of support from a local organization to attest to its work; and
- Other criteria that an organization proposes to demonstrate its local roots.

This definition comes from [USAID's New Partnership Initiative](#) and [ADS 303.6](#).

- **Marginalized groups:** Those who have traditionally been excluded from power and access to resources, and may include indigenous peoples, ethnicities, religious groups, LGBTQI+ populations, women and girls, youth, individuals with disabilities, or other groups.
- **Protection:** an approach that helps us understand and prepare for protection concerns for youth, which can be digital, physical, and psychosocial.
- **Research-to-Change (Implementation Research):** an approach that allows organizations to gather data, take what they learn, and turn it into what they do in real-time.
- **United States Agency for International Development (USAID):** USAID leads international development and humanitarian efforts to save lives, reduce poverty, strengthen democratic governance, and help people progress beyond assistance. USAID funds the Youth Excel program.
- **Youth:** Youth Excel defines youth as people between the ages of 10 and 35. USAID defines youth as people between the ages of 10-29. Youth Excel has expanded this definition to include youth leaders in countries where the definition of youth extends beyond age 29.
- **Youth Excel:** Youth Excel is a global program funded by USAID and implemented by IREX and its Our Knowledge, Leading Change consortium. Youth Excel empowers young people and youth organizations to use implementation research to strengthen local, national, and global development solutions.
- **Youth-Led Organization:** Youth Excel defines youth-led organizations as those whose Chief Executive Officer or other leaders are under the age of 35, and whose Board of Directors are predominantly under the age of 35.





- **Youth-Serving Organization:** Youth Excel defines youth-serving organizations as those who have a mission, mandate, or programs with an expressed priority of serving or supporting youth under age 35.

