

**TERMS OF REFERENCE**

**PROJECT CAPITALIZATION (Re-Advertisement)**

**Name of the Project:**

**“Taking successful innovation to scale - pathways for disability-inclusive graduation out of poverty” (UKAid Direct)**

**Project implementation period**

**April 2018 to December 2021**

**Version: Final**

**Date: 5 October 2021**

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# Chapter 01: INTRODUCTION

### About Humanity & Inclusion

Humanity and Inclusion (formerly Handicap International) is an international non- governmental Organization founded in 1982 and currently located in more than 60 countries worldwide. Humanity & Inclusion is an independent and impartial aid organisation working in situations of poverty and exclusion, conflict and disaster. The organisation works alongside people with disabilities and vulnerable populations, taking action and bearing witness in order to respond to their essential needs, improve their living conditions and promote respect for their dignity and fundamental rights.

### About Humanity & Inclusion in the country/region

Handicap International- humanity & inclusion has recently accomplished Taking Successful Innovation to Scale - Pathways for Disability-Inclusive Graduation out of Poverty project funded by UK AID, which was cascading result of successfully completion of SHIREE (Stimulating Household Improvements Resulting in Economic Empowerment, 2011-2014) and GPAF (Global Poverty Action Fund, 2015- 2018).

The project developed new strategic partnership with BRAC, and the Targeting the Ultra Poor Programme (BRAC-TUP) for scaling up the disability-inclusive poverty graduation at HI beneficiaries’ level at Kurigram Sadar Upazila (Sub-district), Ulipur Upazila of Kurigram district and Sitakunda Upazila of Chottogram district. Mymensingh, Kishoregonj, Gaibandha, Thakurgaon, Rangpur district. Cyclones and regular flooding are correlated with higher rates of poverty, especially in predominately agricultural areas in the project target upazilas. Along with BRAC, DPOs, YPSA, Islamic Relief Bangladesh and Helvetas Swiss Inter Cooperation Bangladesh are the partners of this project with the aim to enhance the sustainability of the project.

# Chapter 02: Context of the Assignment

* 1. **Presentation of the project**

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| Project Title | “Taking successful innovation to scale – pathways for disability – inclusive  graduation out of poverty” (UKAid Direct) Project |
| Implementation dates | April 2018 to March 2022 |
| Location/Areas of intervention | Ulipur and Kurgram under Kurgiram District, and Sitakund Upazila under Chattogram, Mymensingh, Kishorganj, Gaibandha, Thakurgaon, Rangpur |

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| Operating Partners | 1. YPSA – Young Power in Social Action   * Include person with disabilities as beneficiary in their all projects. * Include person with disability related issues in their organizational policies. * Recruit person with disability in their different project. * Maintain liaison with concern line department to support person with disability. * Provide credit (loan from micro finance dept.) to person with disability as their other beneficiaries. * Circulate person with disability related information in their all project. * Provide access to their entire project for HI. * Assist HI to selection of beneficiaries from their existing project beneficiaries.   2. Islamic Relief Bangladesh-   * Include person with disabilities as beneficiary in their all projects. * Include person with disability related issues in their organizational policies. * Assist HI to beneficiary selection from their existing project beneficiaries. * Capacity building of beneficiaries on income generating activities (IGAs). * Accessible training material development for person with disabilities. * Periodically assessment of inclusion through HI’s prescribe inclusion   tools   * Recruit person with disability in their different project. * Maintain liaison with concern line department to support person with disability. * Circulate person with disability related information in their all project. * Provide access to their entire project for HI.   1. Helvetas Swiss Inter-Cooperation Bangladesh-   * Include person with disabilities as beneficiary in their existing projects. * Include person with disability related issues in their organizational policies. * Providing priority for person with disability during recruitment in their different project. * Develop disability friendly data management system. * Maintain liaison with concern line department to support person with disability. |

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|  | * Include person with disability in their market system development. * Circulate person with disability related information in their all project. * Provide access to their entire project for HI.   2. DPOs – Organizations of Persons with Disabilities   * Referral support to person with disability and their family member to Upazila and district health department of Govt. Bangladesh. * Meeting with line department like upazila and district social service office. * Courtyard meeting with person with disabilities. * Ensure disability card for person with disability * Ensure disability allowance and other social safety net support. * Provide peer group support. * Linkage with govt. line department to ensure technical training for person with disabilities. i.e. tailoring training * Provide assistive device to person with disability through coordination with JPUF and others govt. and non-govt. organization like sight savers. * Meeting with upazila and municipality level committee of ‘’rights of   person with disability’’.  **3. Humanity and inclusion: Project Implementation** |
| Target Groups | Persons with disabilities; Men, Women, older people, others marginalized groups |
| **Objectives of the project** | Persons with disabilities in Kurigram and Sitakund graduate out of extreme poverty, have better access to supports in the community and are less vulnerable to shocks and natural disasters. |
| Expected results and indicators | Persons with disabilities and their households in rural Bangladesh are economically empowered and exercise their rights on an equal basis with others |
| Main activities implemented (HI) | Output 1: Persons with disabilities have gained functional autonomy and increased their social inclusion. Major activities are given bellow;   * Community Mobilization, and awareness campaign * Capacity building of DPOs |

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|  | * Rehabilitation support with Accessibility devices and transport, Accessibility and reasonable accommodation, Referral for specific services   Output 2: Persons with disabilities and their households are engaged in resilient economic activities leading to an increase in assets and income. Major activities are given bellow;   * Consumption support; * Market Analysis and Business Development by Helvetas * Service provision for LSPs and Mainstream LSP Models * Strengthening Linkage with Market * Skills Development * Support to women beneficiaries * Risk Assessment and Contingency Plans implementation * Asset Transfer * Self Help groups   Activities under Result 3: Helvetas, YPSA, IR Bangladesh,   * Disability mainstreaming by IRB, Helvetas, YPSA * Number of persons with disabilities accessing different programmes (health, DRR, social protection and livelihood services) run by Islamic Relief Bangladesh (IRB) * Number of persons with disabilities accessing financial services run by   YPSA   * Number of persons with disabilities accessing services provided within Helvetas sustainable livelihoods programme   Activities under Result 4: Poverty Graduation Effectiveness Research |

* 1. **Justification of the Documentation/ Assignment**

The capitalization, in other words “collection and documentation of lessons learnt and good practices” is part of the HI’s global goods. The capitalization will be useful in documenting learnings on how the Disability Inclusive poverty graduation model supports persons with disabilities to graduates out of extreme poverty. This includes capturing how project inputs contribute to increased income generated, as well as increase and/or sustainability of individual and household assets, uptake in strategies to prepare and mitigate against disasters, and overall, how the project supports persons with disabilities and their families to live independently in the community, and grow and maintain their social capital, all of which serves to make them more resilient. This capitalization activity should also aim to capture mechanisms that can promote how greater equality between the genders along socio and

economic indicators; including how women in various positions and roles in households experience greater equality, reduced vulnerabilities to violence and abuse, and access to better services.

Selected learnings and good practices will guide HI to design, implement and evaluate projects on disability inclusive poverty alleviation, and more broadly, economic inclusion, more effectively.

* 1. **Target Audiences for the Collection of Good Practices and Lessons Learnt**

The Collection of Good Practices and Lessons learnt will have the following categories are targeted audiences;

* + - Governments (Relevant Ministries including Social Welfare)
    - FCDO, and relevant donors
    - Program Managers
    - Non-Governmental Organizations and UKAid Direct Project Partners
    - Organisations for Persons with Disabilities.
    - Donors, Researchers and Academicians.
    - Other HI operational countries interested in disability inclusive poverty graduation
  1. **HI UKAID Direct Project Learning Strategy**

In order to collect lessons learnt and good practices from the implementation, HI has rolled out a learning strategy within the organization and the partners. The objective of the strategy was to document learnings on a regular basis, based on various activities implemented at project level with consortium partners. The best practices and lessons learnt identified by the project team are documented and shared with HI’s Country team and partners on a regular basis.

* 1. **HI’s approach to compilation of Lessons Learnt and Good Practices**
* Lessons learnt activity in UKAid Direct Project:
* Quarterly project review meeting lesson learnt, challenges, overcome strategy
* Annual project review lesson learnt, good practices, recommendation, challenges, overcome strategy
* OPD work modalities, good practices, lesson learnt, challenges, overcome strategy
* Mainstreaming organization work modalities good practices, lesson learnt, challenges, overcome strategy
* Annual Self-evaluation of the project
* Web based real time data collection by CLW’s & analysis in quarterly basis
* HI Project team compile and share lessons learnt for the use for internal learning;

# Chapter 03: Overall Objectives of the Assignment

To come up with a well refined final compilation of good practices and Lessons learnt in the area of disability inclusive out of poverty graduation model based on the experience from the implementation of the UKAid Direct Project.

Overall guiding questions (but not limited) have been outlined for understanding the tasks. However, Consultant will explore more with the discussions of the project and steering committee during the inception meeting;

* To document the process (step by step) of the intervention of the project (UK AID Direct); with a specific focus on both the direct implementation of the graduation model, the integration of the market systems development approach and the disability inclusion mainstreaming with Helvetas, YPSA, and Islamic Relief Bangladesh.
* To know and document which area of process did work well and did not work effectively
* To identify and document the challenges faced in process of intervention of this project and how it overcame
* To explore and document, how did sustainability issues address in interventional process
* To explore and document, how did GDA (Gender, Disability and Age) address in interventional process and how the project was gender sensitive

### 3.1 Thematic Areas for capitalization

The key learning questions will be derived from the following thematic areas;

* Disability inclusive poverty graduation model Identification & beneficiaries’ selection
* Psychosocial rehabilitation (Rehab, accessibility, counselling, health care) and consumption support
* Skill training & continuous coaching
* Livelihood assets support, assets transfer, employment, reasonable accommodation (Accessibility, work tools modification)
* Access to Market, Inclusive financial services and saving
* Continuous social inclusion
* Inclusive Market System
* Local Services Providers (LSP) and Progress Out of Poverty (PPI) Model
* Evidence based Graduation model (Randomized Controlled Trial-RCT)
* Roll out web-based data management system
* Women economic empowerment
* Mainstreaming livelihood approach
* Strengthen Organizations of Persons with Disabilities (OPD) / Self Help Groups (SHGs) formation
* Inclusive producer groups
* Community awareness
* Functional rehabilitation
* Psychosocial support

# Chapter 04: Assignment Mode of work

### Location

The compilation will capture lessons learnt and good practices from Ulipur and Kurgram under Kurgiram District, and Sitakund Upazila under Chattogram, and Mymensingh, Kishorganj, Gaibandha, Thakurgaon, Rangpur District. The assignment will need to be done with in person interview and data collection following institutional COVID-19 precautions, and cannot be completed remotely.

### Methodology

Consultant will formulate learning questions which ultimately guide the process and do exercise following several methods to identify the areas of capitalization of the project. Consultant will emphasize on the participatory approach and consultative process like workshop, beneficiaries’ feedback. Consultant may also need to conduct FGD, KII, IDI, collect case study/success stories etc. from person with disability, HH Head, caregiver, female family member, self-help group members, community livelihood worker, OPD (Organization of Persons with Disabilities), project staff – including implementing partners, like Helvetas, YPSA or Islamic Relief.

In addition, the project team have been capitalizing Lessons Learnt and Good Practices in their own which they shared with the consultant for review, guidance and finalization. Consultant needs to follow the following method;

* + - Desk review of the Project’s several documents for understanding the project and project

modalities;

* + - Define and finalize the learning questions;
    - Refine, edit and improve the lessons learnt and good practices already collected internally. Get back to the HI team for more information, clarification to improve on the lessons learnt and good practices’ quality;
    - Conduct workshop, feedback sessions, FGD, KII, IDI, collect case study/success stories as per the define learning questions;
    - Consult consortium partners in order to capture the learning and best practices.
    - Work on the final appearance of the compilation in terms of preparation, editing, proof reading, graphics, alignments, etc. (Final format to be agreed upon at inception phase)

The Consultant in the Technical Proposal should indicate how they intend to carry out the assignment in addition to the propositions from HI. The consultant should also share sample copies of their work that are similar or related to this assignment.

# Chapter 05: Actors involved

The consultant will work closely with Country MEAL Manager for national level and the project manager for the field level. **Expert from HI global office** will involve in reviewing the ToR, participate in the inception meeting aiming to perfectioning the deliverables and review the outputs.

# Chapter 06: Principles and values

### Protection and Anti-Corruption Policy

The Assignment will adhere to the Humanity and Inclusion code of conduct, Protection of beneficiaries from sexual exploitation, abuse and harassment policy, Child Protection Policy, Anti-fraud and anti-corruption policy and DFID rules and regulations (see the table below).

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| [*Code of Conduct*](https://hi.org/sn_uploads/document/ID_CodeOfConduct.pdf) | [*Protection of beneficiaries*](https://hi.org/sn_uploads/document/PI03_HI_Protection-Beneficiaries_EN.pdf)  [*from sexual exploitation,*](https://hi.org/sn_uploads/document/PI03_HI_Protection-Beneficiaries_EN.pdf)[*abuse and harassment*](https://hi.org/sn_uploads/document/PI03_HI_Protection-Beneficiaries_EN.pdf) | [*Child Protection*](https://hi.org/sn_uploads/document/PI02_HI-Child-Protection_EN_1.pdf)[*Policy*](https://hi.org/sn_uploads/document/PI02_HI-Child-Protection_EN_1.pdf) | [*Anti-fraud and*](https://hi.org/sn_uploads/document/PI04_IP_antiFraud-bribery-corruption-policy_1.pdf)  [*anti-corruption*](https://hi.org/sn_uploads/document/PI04_IP_antiFraud-bribery-corruption-policy_1.pdf)[*policy*](https://hi.org/sn_uploads/document/PI04_IP_antiFraud-bribery-corruption-policy_1.pdf) |
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### Ethical measures\*

HI is committed to upholding certain ethical measures. It is imperative that these measures are considered in the technical offer:

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| **Ethical Risks** | **Mitigation Measures** |
| Security of subjects,  Partners and teams | Confidentiality of Subjects/ Persons to be included in the  Compilation should be safeguarded. |
| Ensure the security of personal and sensitive data at all stages of the  activity | All data collected from respondents is collected in a way such that the respondent will not be harmed. |

## \*These measures may be adapted during the completion of the inception report.

# Chapter 07: Expected deliverables and proposed schedule

### Deliverables

### The consultant will propose the capitalization in book publication. The following deliverables are outlined;

1. Inception Report and format of final compilation.
2. First Draft Final Compilation of Process Documentation, Good Practices and Lessons Learnt. (Process monitoring).
3. Second Draft Final Compilation of Process Documentation, Good Practices and Lessons Learnt. (Process monitoring).
4. Final Compilation of Process Documentation, Good Practices and Lessons Learnt. in publication and word document.
5. PowerPoint Presentation by summarizing the findings of the assignment and share with external audiences.
6. 100 sets of publications of the document

The Consultant in the Technical Proposal should indicate how they intend to carry out the assignment in addition to the propositions from HI. The consultant should also share sample copies of their work that are similar or related to this assignment.

### Assignment dates and schedule

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| Phase | Activities | End Date |
| Hiring Consultant | Advertise the TOR to hire a consultant | 30 October |
| Recruitment of Consultant (interview, etc.) | 4 November |
| Kick-off meeting | Kick-off meeting between the Consultant and HI Team | 7 November |
| Inception report, learning question, tool and suggesting format for the final compilation (deliverable 1) | Development of an inception report in order to clarify the process, agree on the number and relevance of good practices and lessons, agree on the deliverables with country teams and partners, agree on the format of the final compilation, etc. | 11 November |

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| Submission of first draft of compilation (deliverable 2) | Collects, capture, document newly, and review existing stories, best practices and learnings. Compile all the best practices and learnings in consultations with project team, partners, enriching to the best shape of the best practices and developing others if needed, compilation of all the documentation. | 9 December |
| Submission of second draft of compilation (deliverable 3) | Consultations with country teams, consultation with partners, enriching the existing best practices and developing others if needed, compilation of all the documentation. | 18 December |
| Final publication in soft copy  (Deliverables 4&5) | Submission and approval of the Final copy of the Compilation of Lessons learnt and best practices and presentation (deliverables 4 & 5). | 25 December |

# Chapter 08: Means

### Expertise sought from the consultant(s) Qualifications and experience required

The composition of the team or individual is expected to be as follows:

* + - The lead Research must have at least Master’s degree in any related field. **Mandatory**
    - Knowledge and proven experience of work in the field of learning and/or knowledge management (how to document knowledge and learnings, best ways to share knowledge and learnings to various audiences, etc.). **Mandatory**
    - Record of Documentation of Lessons learnt and Good Practices (audio, visual, video documentary) from implementation of Projects. **Mandatory**
    - Experience in the area of poverty graduation model documentation is must.

**Mandatory**

* + - Experience and knowledge of Disability programming will be an Added advantage. Provide proof of work in similar work.
    - Excellent interview, teamwork and communication skills and dissemination skills.
    - Ability to write clear, concise reports and presentations in English. Provide copies of previous reports (could be reports, presentations, or any other way in which learnings can be spread)

### Assessing the Consultants/ Firms

### Stage 1: Screening of Applications (Administrative review)

* + - All applications will undergo a preliminary screening to ensure the application has all the necessary documents/ requirements.
    - Administrative review will look at the minimum requirements; CV, Cover/ application letter, technical proposal, financial proposal, if it’s a company submit legal registration certificates (if any individual consultant no legal registration needed).

### Stage 2: Shortlisting of Applications

* + - From the Consultants/ Firms that meet all the minimum requirements and have been screened, they are assessed using document review using the criteria below.
    - A reasonable number of candidates/ firms will be selected to move to the next stage of the interview. This will be based on the scores according to the Criteria below.
    - The shortlisting will be based on team experience/ composition, Experience in documenting learning/ knowledge management, Proposed methodology and quality of previous reports.

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| General Profile | Bid review: Experience in documenting learning/ knowledge  management (1 to 15) | Bid review: Relevance of the proposed tools/ Methodology (1 to 15) | Bid Review: Quality of Previous Reports/ Assignments (1 to 15) |
| 10% | 20% | 15% | 15% |

### Stage 3: Interview of the shortlisted Consultants

* + - The shortlisted applicants will be interviewed based on the; Experience with Disability and SRH, proposed tools/ Methodology, Soft skills (communication / English / writing

/ consortia) and Means and Planification.

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| Means and Planning | Interview: Experience in documenting learning/  knowledge management | Interview: Relevance of the proposed tools/ Methodology | Soft skills (communication / English / writing / consortia,  Flexibility) |
| 5% | 20% | 10% | 5% |

* 1. **Recruitment Process**

The recruitment of the consultant/ firm will follow a competitive and transparent process. A call for consultant(s) will be advertised. From the pool of applicants, a reasonable number will be shortlisted and interviewed. The consultant will be assessed based on the standards as stipulated in the Assessment Criteria.

* 1. **Budget allocated to the Assignment/ Documentation**

The Consultant should submit a detailed Financial Proposal clearly outlining technical fees of the Consultant(s) per day, number of days spent at each stage of the assignment, cost of proof reading, review, Logistics (internet costs, stationery costs, etc.).

The payments will be released based on the submission of deliverables, as follow:

* 25% after the submission of deliverables 1 - inception report and format for the final compilation
* 75% after the submission of deliverable 3,4,5 - compilation and final submission with presentation

## **Caution:** please note that the last payment is conditional on the validation of the Compilation of Good practices and Lessons learnt and not on the sending of the final report.

# Chapter 09: Submission of applications

### Application must be submitted in English and include:

* + - * Interested Firms/ Consultants MUST submit Cover letter and CV of the led consultant (maximum 4 pages; with references), Company profile(s) if it’s a firm/ organization and documentation of legal status, and registration as a Company (Trade License, E-TIN, VAT Registration as consultancy firm).
      * Technical proposal (maximum 10 pages) including the proposed methodologies and proposed schedule.
      * Financial Proposal. The financial proposal should provide cost estimates for services rendered including daily consultancy fees. The consultant has to cover all field related costs (internet, soft wares, etc.). Note the assignment is remote based and the consultant will not be required to travel to any country.
      * Sample of previous work/ production on documentation of learning (compilation, report, final products).
      * Consultants that meet the requirements should submit soft copy application by email to: [logistics@bangladesh.hi.org.](mailto:logistics@bangladesh.hi.org) Email must not exceed 10MB.
      * Submission deadline: 30 October 2021 (11.59 PM)

# Chapter 10: Appendices

## [The Disability - Gender - Age Policy,](https://hi.org/sn_uploads/document/IP_DisabilityGenreAge_1.pdf) which must guide the approach and the construction of evaluation tools in the technical offer.