



Foreign, Commonwealth & Development Office



CALLDOWN CONTRACT

Framework Agreement with: Alinea International Ltd.

Framework Agreement for: Global Evaluation and Monitoring Framework Agreement (GEMFA) Lot 4

Framework Agreement ECM Number: ECM_4755

Call-down Contract For: Monitoring and Evaluation of SCALE Programme

Contract ECM Number: ECM_6139

I refer to the following:

1. The above-mentioned Framework Agreement dated 1st Feb 2023.
2. Your proposal of 06/02/2024.

and I confirm that FCDO requires you to provide the Services (Annex A), under the Terms and Conditions of the Framework Agreement which shall apply to this Call-down Contract as if expressly incorporated herein.

1. Commencement and Duration of the Services

- 1.1 The Supplier shall start the Services no later than 22nd February 2024 ("the Start Date") and the Services shall be completed by 31 March 2028. ("the End Date") unless the Call-down Contract is terminated earlier in accordance with the Terms and Conditions of the Framework Agreement.

2. Recipient

- 2.1 FCDO requires the Supplier to provide the Services to the FCDO (the "Recipient").

3. Financial Limit

- 3.1 Payments under this Contract shall not, exceed £599,878 ("the Financial Limit") and is inclusive of any government tax, if applicable as detailed in Annex B.

22. PAYMENTS & INVOICING INSTRUCTIONS

The following Clause 22.4 shall be substituted for Clause 22.4 of the Section 2, Framework Agreement Terms and Conditions.



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- 22.4 Where the applicable payment mechanism is "Milestone Payment" invoice(s) shall be submitted for the amount(s) indicated in Annex B and payments will be made on satisfactory performance of the services, at the payment points defined as per schedule of payments. At each payment point set criteria will be defined as part of the payments. Payment will be made if the criteria are met to the satisfaction of FCDO.

When the relevant deliverable is achieved in its final form by the Supplier or following completion of the Services, as the case may be, indicating both the amount or amounts due at the time and cumulatively. Payments pursuant to clause 22.4 are subject to the satisfaction of the Project Officer in relation to the performance by the Supplier of its obligations under the Direct Award Contract and to verification by the Project Officer that all prior payments made to the Supplier under this Direct Award Contract were properly due.

4. Officials FCDO

- 4.1 The Project Officer is:
Name: /REDACTED/
Email: /REDACTED/
Telephone: /REDACTED/

- 4.2 The Contract Officer is:
Name: /REDACTED/
Email: /REDACTED/
Telephone: /REDACTED/

Supplier

- 4.3 The Contract Officer is:

Name: /REDACTED/
Email: /REDACTED/
Telephone: /REDACTED/

- 4.4 The Project Officer is:

Name: /REDACTED/
Email: /REDACTED/

5. Key Personnel

The following of the Supplier's Personnel cannot be substituted by the Supplier without FCDO's prior written consent:



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/REDACTED/

6. Reports

- 6.1 The Supplier shall submit project reports in accordance with the Terms of Reference/Scope of Work at Annex A.

7. Duty of Care

All Supplier Personnel (as defined in Section 2 of the Agreement) engaged under this Contract will come under the duty of care of the Supplier:

- I. The Supplier will be responsible for all security arrangements and Her Majesty's Government accepts no responsibility for the health, safety and security of individuals or property whilst travelling.
- II. The Supplier will be responsible for taking out insurance in respect of death or personal injury, damage to or loss of property, and will indemnify and keep indemnified FCDO in respect of:
 - II.1. Any loss, damage or claim, howsoever arising out of, or relating to negligence by the Supplier, the Supplier's Personnel, or by any person employed or otherwise engaged by the Supplier, in connection with the performance of the Contract;
 - II.2. Any claim, howsoever arising, by the Supplier's Personnel or any person employed or otherwise engaged by the Supplier, in connection with their performance under this Contract.
- III. The Supplier will ensure that such insurance arrangements as are made in respect of the Supplier's Personnel, or any person employed or otherwise engaged by the Supplier are reasonable and prudent in all circumstances, including in respect of death, injury or disablement, and emergency medical expenses.
- IV. The costs of any insurance specifically taken out by the Supplier to support the performance of this Contract in relation to Duty of Care may be included as part of the management costs of the project, and must be separately identified in all financial reporting relating to the project.
- V. Where FCDO is providing any specific security arrangements for Suppliers in relation to the Contract, these will be detailed in the Terms of Reference.

Enclosures:

1. Alinea International Ltd. Concept Note Proposal /REDACTED/

Foreign Commonwealth and Development Office

Terms of Reference

**Monitoring and Evaluation of Scaling Access and Learning in Education
(SCALE) Programme**

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Acronyms list

1. EdGE - Education, Gender and Equality Directorate
2. EQUALS – Evaluation, Quality, Assurance and Learning Service
3. FCDO – Foreign, Commonwealth and Development Office
4. GED - Girls' Education Department
5. LICs and LMICs - Low Income Countries and Lower-Middle Income countries
6. MEL – Monitoring, Evaluation and Learning
7. ODA – Official Development Assistance
8. PM – Programme Manager
9. PRO – Programme Responsible Owner
10. SCALE – Scaling Access and Learning in Education
11. SRO – Senior Responsible Owner
12. TA – Technical Assistance
13. ToR – Terms of Reference
14. VfM – Value for Money

Introduction

1. The Foreign, Commonwealth and Development Office (FCDO) Girls' Education Department (GED) within the Education, Gender and Equality (EdGE) Directorate leads on the delivery of the Government's commitment to stand up for the right of every girl around the world to 12 years of quality education.
2. FCDO is appointing Alinea International Ltd. to provide Monitoring and Evaluation for the centrally managed programme Scaling Access and Learning in Education (SCALE).
3. This Terms of Reference (ToR) details the requirements and responsibilities for these services. The Contract will run for up to 4 years and 2 months between 22nd February 2024 and March 2028.
4. The Contract budget for the 4 years and 2 months is up to a maximum of £599,878 inclusive of all Government Taxes but exclusive of VAT.

Context

5. The SCALE programme is a new centrally managed programme that will provide up to £68m over four years to improve the effectiveness of education financing in low and lower-middle income countries. It recognises that UK Official Development Assistance (ODA) is just a small fraction of education financing and is therefore working with partners to influence domestic and other ODA spend on education. The programme is solely funded by FCDO.
6. SCALE will be central to the UK's commitment to women and girls as set out in the International Development Strategy¹ and the recently announced Women and Girls Strategy². It will directly contribute to Sustainable Development Goal 4 (ensure inclusive and equitable quality education and promote lifelong learning opportunities for all) by accelerating country-led action to get more girls into school and learning.
7. SCALE will bring together UK-led expertise, funding, support, and influence. It aims to increase the uptake of cost-effective interventions that deliver foundational learning outcomes for all, especially disadvantaged girls and boys.
8. The programme will draw on rigorous evidence, including from the Global Education Evidence Advisory Panel's Education Smart Buys³ and other sources. This will include supporting the scale-up of evidence-based

¹ [International Development Strategy](#)

² [Women and Girls Strategy](#)

³ [Global Education Evidence Advisory Panel](#)

interventions that improve the quality of teaching and learning (in-school and out of school), as well as interventions that tackle the barriers that keep children from accessing and regularly attending school.

9. The programme will work across Low Income Countries (LICs) and Lower-Middle Income (LMICs) countries and will include up to 10 countries in which test-learn-adapt pilots will be implemented (see component detail in para.11). The programme is in its inception phase and geographic locations of the programme are yet to be determined. The programme is aiming to help Posts in ODA-eligible countries, primarily in sub-Saharan Africa and South Asia.
10. Programme partners will be a mix of NGO's, private organisations, or multi-laterals. Many of these partners will be in place in early 2024, at a similar time to this agreement.
11. The programme will be delivered through three components:
 - **Technical assistance** to adapt evidence-based interventions to new contexts. This will be provided through a mixture of in-house experts and external organisations. This will form part of a new FCDO Centre of Expertise for Education and support will be accessed by FCDO staff working in ODA-eligible posts.
 - **Test-learn adapt pilots:**
 - o **Up to 10 pilots** which will take a 'test-learn-adapt' approach to support the scale-up of successful education initiatives into national systems. The pilots will be delivered through a mix of agreements with NGO's, private organisations or multi-laterals and take place in LICs and LMICs. Criteria for selection of these pilots includes the evidence-base for the interventions, education need of a country, political will of partner governments, and credibility of future scaling. (Full criteria can be found in the published Business Case.⁴)
 - o **Rigorous test-learn-adapt research.** Each test-learn-adapt pilot will have a rigorous evaluation and research component, likely managed by an overarching expert research organisation(s), yet to be contracted. The evaluation and research methodology will vary across pilots, depending on the type of intervention, country context, and evidence need. These methodologies are likely to include a mix of real-time data collection (for optimisation) and impact evaluations (including experimental and non-experimental designs). This will run separately to this agreement.
 - **Partnerships:** Influencing others to scale up promising interventions by building strategic partnerships with philanthropists, partner governments

⁴ [Published Business Case.](#)

and leveraging multilaterals (including World Bank and Global Partnership for Education).

12. The programme’s Theory of Change is below (figure 1). This is supported by figure 2, a normative pathway to improve learning at scale, designed by the FCDO education team. This figure explains how the different components / outputs contribute to the intermediate and long-term outcome of sustained scaling. This pathway is closely linked to the programme's Theory of Change, which includes outputs contributing to different stages of the normative pathway to scale:

- **Technical assistance** will focus on scoping enabling environments for education reform and supporting evidence-based interventions to be adapted to new contexts.
- **Pilots** will test and adapt interventions in new contexts, optimising them for future scaling.
- **Partnerships** will mobilise support (financing and political commitment) for the future scaling and on-going embedding of evidence-based interventions for long term sustainability.

Figure 1: SCALE Theory of Change (updated since Business Case in August 2023)

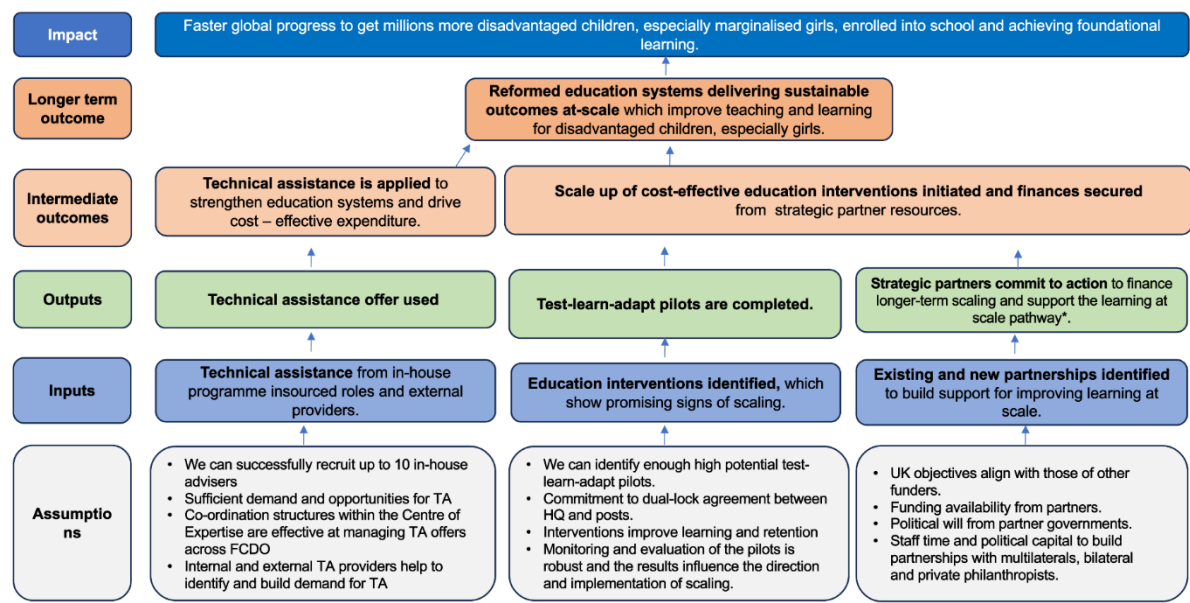
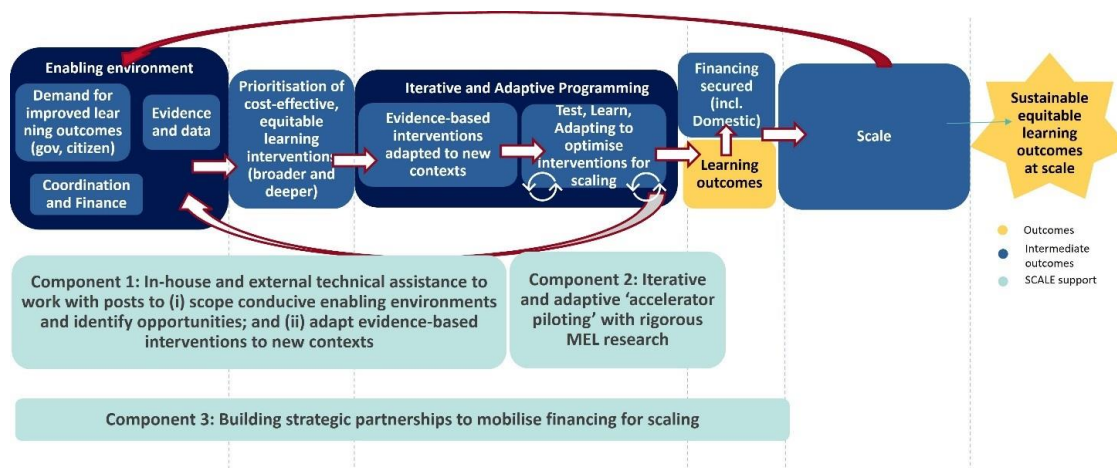


Figure 2: FCDO Pathway for Scaling Learning Outcomes



Objectives of the Contract

13. The purpose of this Contract is to provide services in both monitoring and evaluation of the SCALE programme. These will combine to build a strong evidence base for programme learning and accountability. Overall, the objective is to assess the extent to which the design and implementation of the SCALE programme supports FCDO's normative Pathway for Scaling Learning Outcomes (figure 2).
14. The SCALE outcomes are that disadvantaged children, including children from hard-to-reach areas, children from minority groups, girls, and children with disabilities will benefit from the SCALE programme.
15. Under the **monitoring activities**, the Supplier will monitor the delivery of specific areas of the programme Theory of Change up to outcome level, using indicators defined in the draft programme Logframe. The Supplier will also monitor Value for Money (VfM) of the overall SCALE programme. These data will feed into FCDO monitoring and reporting requirements and the SCALE evaluation.
16. The **evaluation activities** will be of two types: formative and summative:
 - Formative activities will require the Supplier to evaluate the extent to which the structure, organisation and delivery of the programme is working as intended, making recommendations for how it may be adapted to perform better.
 - Summative activities will require the Supplier to evaluate the extent to which the programme was or is likely to be successful in supporting the scale up of the pilot interventions and setting education systems on a pathway to change that improves teaching and learning outcomes.

The Scope of the Contract

17. Due to the SCALE Programme likely to be running in both sub-Saharan Africa and South Asia the fieldwork related to delivery of MEL activities under this Contract will be required in the test-learn-adapt pilot countries. Please see Clause 52.
18. The Supplier will be working with other partners delivering the SCALE programme, but the Supplier won't be directly working with beneficiaries (children in LICs and LMICs).
19. FCDO will have overall responsibility for the SCALE programme logframe and will only be required to define and monitor a sub-set of logframe indicators specified by FCDO (as outlined in para. 25).
20. This Contract does not substitute or replace the monitoring and reporting requirements of the implementing partners or researchers working on the individual SCALE components.
21. The focus of the programme is to improve access to quality education that delivers foundational learning outcome improvements for all, with the focus on the most marginalised. Data disaggregated by sex, disability status, location, income quantile and other relevant characteristics will be collected as appropriate through all SCALE research, monitoring and evaluation activities.

Recipients & Beneficiaries

22. The recipient of these services is FCDO.
23. The beneficiaries are disadvantaged children, especially marginalised girls, as outlined in the Theory of Change at Impact level.

Monitoring Approaches

24. Monitoring under the Contract will encompass qualitative logframe indicators against the selected outputs and outcomes in the SCALE Theory of Change. FCDO will have overall responsibility for the logframe and the Supplier will be responsible for monitoring only those areas of the logframe specified by FCDO. Table 1 presents outcomes, outputs and example indicators the Supplier will help to monitor. The Supplier will develop and finalise the indicators during the inception phase. SCALE implementers will be responsible for other areas of the logframe. Within some outputs and outcomes, FCDO, the Supplier and SCALE implementers may monitor different indicators.

25. Outcome mapping and outcome harvesting approaches and methods such as outcome workshops, interviews and surveys are, amongst others, suitable to fulfil the monitoring requirement. The Supplier will develop monitoring indicators, methods and data collection tools in the inception phase.

Table 1: Logframe outputs, outcomes and indicative indicators within scope for monitoring under the Contract:

Logframe output / outcome	Example indicator
Outcome: Reformed education systems delivering sustainable outcomes at-scale which improve teaching and learning for disadvantaged children, especially girls	Proportion of pilot countries that adopt pilot interventions at national or sub-national level of Moderate or Major significance in a verified Impact Story
Intermediate outcome: Technical Assistance (TA) is applied to strengthen education systems and drive cost – effective expenditure	Proportion of TA projects that record a change to an education system of Moderate or Major significance in a verified Impact Story
Intermediate outcome: Scale up of cost-effective education interventions initiated and finances secured from domestic and/or strategic partner resources	# of test-learn-adapt pilots where there is evidence of adequate finances mobilised from partner government and/or strategic partners to support scale-up
Output: Technical assistance is used	Proportion of (a) users and (b) providers that rate TA as satisfactory or better

26. In addition to this, the Supplier will develop and implement a VfM framework to monitor SCALE's VfM throughout the life of the programme. This will include working with FCDO to develop criteria, indicators and data collection methods that the Supplier will use to track SCALE's VfM on a regular basis. Example VfM indicators were included in the SCALE business case and are in Table 2. The Supplier will further develop these as part of finalising a VfM framework for submission in May 2024 (see para.62).

Table 2: Indicative Value for Money Indicators

VfM measure	Indicators (qualitative and quantitative)
Economy	<ul style="list-style-type: none"> ▪ Fee rates of consultants ▪ Cost and effectiveness of insource roles vs external consultants.

	<ul style="list-style-type: none"> Assessments of partner procurement systems, including benchmarking practices
Efficiency – <i>spending well</i>	<ul style="list-style-type: none"> Progress against logframe output indicators relative to budget performance Average time (months) to identify, agree and finalise accelerator pilots from Business Case approval date Country and regional examples of identifiable influence on policy uptake and programmatic decision-making to improve foundational learning
Effectiveness – <i>spending wisely</i>	<ul style="list-style-type: none"> Progress against logframe outcomes relative to budget performance Improvements in foundational learning outcomes (reading and numeracy benchmarks) Improvements in primary school grade progression and completion rates Improvements in capacity of teachers Country examples of technical assistance and accelerator pilots improving the effectiveness of other UKaid investments (bilateral country programmes, multilateral investments)
Equity – <i>spending fairly</i>	<ul style="list-style-type: none"> Gender equity ratio of children reaching basic competency levels in literacy and numeracy. Proportions of those completing primary in each wealth quintile and differences in learning outcomes by socio-economic background Inclusiveness of education delivery and learning outcomes of children with disabilities.
Cost-effectiveness	<ul style="list-style-type: none"> Cost to achieve a minimum threshold in basic skills (numeracy and literacy) Additional funding crowded-in as a % of FCDO funding that expands accelerator pilots

Evaluation Approach and Questions

27. FCDO requires that the formative and summative evaluation take a theory-based approach using multiple methods suited to the evaluation objectives and questions. The formative evaluation must use but not be limited to the following methods such as document review, interviews, surveys and observation. The Supplier will determine and apply suitable approaches to the summative evaluation including but not limited to contribution analysis, utilisation-focused evaluation, and realist evaluation.

28. FCDO does not prescribe a methodology for conducting evaluation, and leaves it up to the Supplier to propose and deploy.

29. **Evaluation questions for the formative evaluation** include:

- How well are the different aspects of the SCALE programme being implemented and working together?
 - a. Internal coherence: To what extent does the structure of the SCALE programme, including governance arrangements and relations between delivery partners, support the delivery of the programme and achievement of its objectives? To what extent are they working together to contribute to the learning at scale pathway?
 - b. Effectiveness: How successfully are the three SCALE components working? What might be changed to increase the likelihood that the programme will be effective? What is causing any observed variation in delivery of the components (technical assistance, pilots, partnerships) and has programme implementation varied by country or pilot modality? Are there more or less successful models of implementation?
 - a. Efficiency: To what extent is the SCALE programme making best use of its resources to maximise the chance that programme outcomes will be achieved?
 - b. Relevance: Are SCALE's technical assistance and pilot components providing the right kind of information to support positive change in education systems and the scale up of pilot interventions?

30. Evaluation questions for the summative evaluation include:

- Did the SCALE programme produce the intended results? Did the programme represent good value for money?
 - a) Effectiveness: To what extent has SCALE led to the adoption and scale-up of pilot interventions at national or sub-national level? What impact is the SCALE programme having on strengthening education systems and driving cost-effective expenditure? To what extent has SCALE led to the development of strategic partnerships and the mobilisation of finances that support the scale up of pilot interventions and other education system reforms? How successfully has SCALE's technical assistance offer and test-learn adapt pilots led to the reform of education systems?
 - b) Sustainability: What is the SCALE programme teaching education stakeholders about the best enabling environments and processes to take interventions to scale? What are the success criteria for development partners and government stakeholders buying-in to SCALE interventions and taking them to scale?

31. The Supplier will work with FCDO during the contract inception phase to finalise the evaluation questions and sub-questions.

32. Data sharing agreements and processes will need to be put in place between the Supplier and implementing partners, including consideration of timeliness of data sharing and collection throughout the programme cycle. It will be

important for the Supplier to set out expectations and design principles early on with implementers.

Contract Outputs and Requirements

33. Monitoring outputs will be used in routine programme monitoring by FCDO, including mandatory programme annual reviews (which will be conducted each March).
34. The formative evaluation outputs will be used by the FCDO SCALE programme team and delivery partners to adapt the delivery of the programme, if required. The summative evaluation outputs will be published and used by FCDO to help it fulfil accountability requirements and for learning by FCDO and other stakeholders.
35. Monitoring and evaluation outputs are also likely to be of interest to and used by governments and development partners with whom the Supplier will interact to collect data and share learning.
36. A provisional set of outputs, activities and indicative timings are set out below. The final set of implementation outputs, activities and timetable will be finalised in agreement with FCDO in the inception period.
37. The Contract will consist of two phases: an inception and implementation phase.

Inception Phase: (8 weeks)

38. During the inception phase the Supplier will deliver the following outputs along with the following activities. Please note that this is not an exhaustive list of activities.
39. **Output 1: An inception report.** The inception report will be an inception phase deliverable and will need to be approved by the FCDO SCALE programme Senior Responsible Owner (SRO) before the Contract moves to implementation.
40. The FCDO will hold a kick-off meeting to detail what is required from this report. The reporting requirements section lists the expected contents of the report, which also acts as a guide to activities that will need to be completed in this phase.
41. Engagement and joint planning with the implementers of the three SCALE components will be required during the inception phase.
42. FCDO recognises that detailed planning for the summative evaluation will further develop and be adapted during implementation.

Formal Review Point

43. The Contract will have a formal review point at the end of the inception phase to determine whether the Contract should proceed to its implementation phase. This will take place within 2 weeks of receiving the final inception report. Continuation of the Contract beyond the review point will be subject to Supplier's performance and acceptance of inception phase deliverables by FCDO.

Implementation Phase (April 2024 – March 2028)

44. Implementation will begin in April 2024 and the agreement will continue until the programme closure in March 2028.
45. **Output 2: Monitoring**. Collection of monitoring and evaluation data for SCALE logframe indicators within the Supplier's areas of responsibility. Activities under this output will include:
- a. Design data collection methods for indicators specified by FCDO (see table 1 indicative examples).
 - b. Lead the collection of data against these indicators.
 - c. Continue to refine and update logframe indicators throughout the programme lifecycle.
46. Data collection and reporting against logframe indicators will be on an annual basis and in line with FCDO's annual review cycle which for SCALE completes at the end of March each year.
47. **Output 3: Value for Money (VfM)**. Support the design and implementation of a VfM framework for SCALE. Activities under this output will include:
- a. VfM framework designed for SCALE.
 - b. Analyse VfM of the programme and provide FCDO with recommendations for improving SCALE's VfM.
 - c. Continue to refine VfM indicators and the VfM framework throughout the course of the programme.
48. Data collection and reporting against VfM indicators will be on an annual basis and timed for inclusion in FCDO's annual review cycle for SCALE (end of March).
49. **Output 4: Formative evaluation** providing evidence to FCDO and partners on the degree to which implementation of the SCALE programme is working as intended and making recommendations for how programme delivery may be improved. This will comprise three classes of activity:
- i. Written reports to FCDO against evaluation questions set for the formative evaluation. These will be required every six months in the first two years of programme delivery as the SCALE components

mobilise and begin to mature. This will enable FCDO and partners to act on emerging findings as necessary.

- ii. Organise and facilitate learning and reflection workshops that draw on the reports and which facilitate adaptive management of the programme. These are required to take place every six months for the first two years of the programme, approximately coinciding with completion of the first five test-learn-adapt pilots.
- iii. A final report that consolidates learning from the formative evaluation phase. This will be required at the end of the formative phase of the evaluation, expected to be at the end of June 2026.

50. **Output 5: Summative evaluation** exploring the extent to which the programme was successful in supporting the scale up of the pilot interventions and setting education systems on a pathway to change. The main deliverables will be:

- Final summative evaluation plan including evaluation framework, questions, design, method, and data requirements. This will be submitted in May 2024.
- Mid-term evaluation report. A learning-focused report describing progress made toward the achievement of programme outcomes and making recommendations. This will be submitted in by September 2026.
- Final summative evaluation report. This will be submitted in December 2027.

51. With respect to the formative and summative outputs, presentations to the Evaluation Management Group and / or the Reference Group will be required to accompany each substantive report. (For details on these Groups, see Governance and Quality Assurance Arrangements.) Additional presentations or other participation in internal and external learning and dissemination events is also required. The Supplier will also be required to produce a short summary of the summative and formative evaluation reports for publication on FCDO's website.

Table 3 outlines the deliverables / outputs and the associated activities along with the timelines for the Contract implementation phase.

Table 3: Deliverables / outputs, activities and timelines for the Contract implementation phase

Deliverables / Outputs	Activities	Timeline/frequency
Output 2: Collection of monitoring and evaluation data for SCALE logframe indicators.	Refine and strengthen indicators as needed. Data collection against allocated indicators.	Annually, with data collection complete by end of December of each year, in time to feed into the SCALE Annual Review completed in March of each year.

Output 3: Develop and implement a VfM framework, including collection of VfM data.	Development of the VfM framework, including VfM criteria, indicators, data requirements, data collection methods and timetable. Data collection against allocated indicators. VfM progress and recommendations reports.	Final VfM framework submitted May 2024. Annual VfM progress reports, with data collection complete by end of December of each year, in time to feed into the SCALE Annual Review in March each year.
Output 4: Formative assessment	Conducting evaluation with chosen methods and reporting on formative evaluation questions. Facilitating workshops to support adaptive management.	Written reports bi-annually in the first two years (first report expected June 2024, last report December 2025). Four reports in total. Workshops bi-annually in the first two years of the Contract, in line with written reports. Final report at the end of formative evaluation period, June 2026.
Output 5: Summative assessment	Conducting evaluation with chosen methods and reporting on summative evaluation questions.	Final Summative Evaluation Plan submitted May 2024. Mid-term report by September 2026 and final report in December 2027.

52. Most activities will be desk based, with travel required to a sample of test-learn-adapt pilot locations to collect data and inform evaluations. Whilst geographic locations and number of countries are yet to be determined, the Supplier has budgeted for travel / accommodation and subsistence costs to cover travel to a maximum of 10 and minimum of 5 countries for field visits. The exact number and location of these pilot visits will be determined during the Contract subject to Contract amendment process.

Constraints, Dependencies and Risk Management

53. There is relatively limited evidence on how to effectively scale education interventions in the low-income contexts. The data and learnings produced through this Contract will help to build a body of knowledge to help inform the direction of this programme and future FCDO investments.

54. Most data sources required for the monitoring and evaluation will be new and reliant on the Supplier. Some data will routinely be collected by SCALE programme implementers and activities, such as the research component working alongside the 'test-learn-adapt' pilots. This data will be made available and shared with the Supplier.

55. A full risk assessment shall be conducted by the Supplier during the inception phase. Amongst the risks identified by FCDO and which the Supplier must build into their approach to the evaluation and address:

- Acquiring and retaining sufficient knowledge of SCALE, given its diverse components, partners and activities, including operating in up to 10 pilot countries.
- Building relationships at the right levels across SCALE implementers and stakeholders to collect data and supply the evidence required for monitoring, evaluation and learning activities.
- Ensuring personnel with key responsibilities for delivering the activities under this Contract have the required skills and expertise.
- Retaining continuity in the monitoring and evaluation team, given the duration of the services and Contract.
- Limited capacity of SCALE implementing partners in monitoring and evaluation, potentially meaning that their data is not reliable or timely enough to monitor or evaluate performance.

Governance and Quality Assurance Arrangements

56. Monitoring and evaluation activities under this Contract will be overseen and managed by a FCDO Monitoring Evaluation and Learning (MEL) Management Group comprising the SCALE Programme Responsible Owner (PRO) and Programme Manager (PM), and the Girls' Education Department Evaluation Adviser. The Management Group will invite the SCALE SRO and other internal experts to participate in oversight activities as it deems necessary.

57. The Management Group will provide first-line quality assurance of outputs under this Contract. The inception report, final formative evaluation report and final summative evaluation report will be quality assured by FCDO's Evaluation Quality Assurance and Learning Service (EQUALS). The Management Group may use EQUALS to quality assure other products.

58. A separate MEL Reference Group comprising the Management Group, the SCALE SRO and representatives from the implementers for the three SCALE components will meet periodically in full or partially to discuss and respond to evaluation outputs and participate in programme reflection and adaptation workshops as required.

Performance Requirements

59. FCDO will monitor Supplier's performance continuously throughout the duration of the Contract.
60. The FCDO MEL Management Group will meet with the Supplier every two weeks during the inception phase and then quarterly in the implementation phase. At the Management Meetings, the Supplier will be measured against the deliverables set out under this Contract and reported in quarterly and annual progress reports. An outline of the content of these reports is included in the Reporting Requirements section. The exact format of the progress reports will be discussed and agreed during the inception phase.

Reporting Requirements

61. All reports are to be submitted to the SCALE Programme Manager (Arial font size 12)
62. Reporting requirements, which may be adjusted in the inception phase, include:

Inception Report

Submission: Submitted 8 weeks following the Contract commencement date. A draft report is to be submitted no later than 6 weeks following the Contract commencement date. (No longer than 30 A4 pages).

Content:

- Summary of progress and achievement against the inception phase deliverables.
- Detailed workplan for the first year and indicative workplan for the remainder of the contract, including timetable, budget forecasts and financial management plan.
- Monitoring plan detailing the finalised SCALE logframe indicators that the Supplier is responsible for and the data collection method and timetable.
- Plan for developing SCALE's VfM framework and ongoing VfM monitoring.
- Evaluation plan and evaluation matrix detailing the questions and approach for the summative and formative evaluations.
- Format and timetable for the learning and reflection workshops.
- Governance and quality assurance processes.
- Initial Risk Matrix including delivery chain risk map with mitigation measures.
- Stakeholder map and stakeholder engagement / influencing strategy.
- Data sharing plans and agreements.
- Approach to ethics and safeguarding.
- Dissemination and use plan for monitoring and evaluation outputs.
- Communications strategy outlining how the Supplier will represent themselves to FCDO and work alongside other SCALE partners.

- Initial logframe or alternative results framework covering the Supplier's monitoring and evaluation work, capturing the Supplier's own performance, VfM and milestones.

Quarterly report

Submission: Submitted each quarter. No longer than 15 A4 pages.

Content:

- Narrative report on progress across the preceding quarter, including progress against the workplan and, when appropriate, results framework indicators.
- Planned activities for the coming quarter.
- Updated annual workplan
- Risk management update to include an updated Risk Matrix.
- Lessons Learned.
- Financial update to include:
 - Reconciliation of previous quarter's expenditure against forecast.
 - Justification for variances of actual spend against the forecast.
 - Update of forecast of the remainder of the year.
 - Draft Quarterly Invoice for approval prior to submitting for processing.

Annual report

Submission: Submitted in January each year. This is timed to feed into the SCALE Annual Review. No longer than 20 A4 pages.

Content:

- Summary of progress against the workplan and logframe / results framework for the previous year.
- Lessons learned on activities and adaptations made to the MEL approach, if appropriate.
- Progress against SCALE Annual Review recommendations relevant to the MEL Contract.
- Work plan for following year.
- Update on stakeholder engagement/influencing.
- Updated Risk Matrix including Supply Chain and mitigations.
- Financial update, setting out actual expenditure to date and revised forecast for the following quarters.

VfM framework and progress reports

Submission: VfM framework submitted in May 2024. No longer than 15 A4 pages. VfM progress reports submitted in January each year. This is timed to feed into the SCALE Annual Review. No longer than 10 A4 pages.

Content:

- VfM framework: detailed description of SCALE VfM approach, criteria, indicators, data collection methods and workplan.

- VfM progress reports:
 - narrative report detailing SCALE's performance against the VfM indicators
 - analysis of SCALE's VfM based on the VfM framework
 - recommendations for how VfM may be improved
 - proposed refinements to the VfM framework and indicators as required.

Formative Evaluation Reports

Submission: Emailed to the SCALE Programme Manager as follows:

- Bi-annual formative evaluation reports submitted in June and December of 2024 and 2025 (4 reports in total). (Timing may be adjusted to align with the quarterly reporting and annual reporting cycle.) No longer than 30 A4 pages excluding annexes.
- Final formative evaluation report submitted in June 2026. No longer than 40 A4 pages excluding annexes.

Content:

- Each bi-annual report and the final report will cover the relevant evaluation objectives and questions, the methodology, findings, conclusions, and recommendations, and will have an executive summary. The exact content and format of these reports will be established in the inception phase.

Summative Evaluation Reports

Submission: Emailed to the SCALE Programme Manager as follows:

- Final summative Evaluation Plan, submitted in May 2024. No longer than 20 A4 pages.
- Mid-term summative evaluation report submitted no later than September 2026 and final summative evaluation report submitted in December 2027. Each report no longer than 50 A4 pages excluding annexes.

Content:

- The evaluation plan will include the evaluation framework, questions, design, method, data requirements and workplan.
- The mid-term and final reports will cover the relevant evaluation objectives and questions, the methodology, findings, conclusions, and recommendations, and will have an executive summary. The exact content and format of these reports will be established within the Evaluation Plan.

63. All reports will be presented at MEL Management Group meetings. Additionally, evaluation reports will be presented to the Evaluation Management Group and / or the Reference Group (see para.51).

Skills and Competency Requirements

64. The monitoring and evaluation team will need the following skills and expertise to deliver the requirements of the Contract:

- Expertise in education programming.
- Expertise in qualitative monitoring and evaluation methods and techniques
- Expertise in working on education reforms in LICs and LMICs
- Expertise in adaptive management in programme delivery
- Track record of delivering high quality formative and summative international development evaluations
- Capability to collaborate with a wide range of stakeholders in LICs and LMICs, including FCDO officers, experts in education, international development programme implementers, and policy makers.
- Skills and expertise in assessing value for money.
- Excellent written and oral communication skills in English.
- Gender equality and social inclusion expertise

65. The Supplier will engage local staff for the field visits and participation of local evaluators is expected.

Budget and Timeline

66. The Contract budget is limited up to £600,000 inclusive of all Government Taxes but exclusive of VAT. The Supplier will commence the services under this Contract within 5 working days from the Contract award date.

Payment Mechanism

67. Inception Phase:

The inception phase payments will be output-based and linked to the successful delivery and acceptance of the inception phase deliverables. The amount due is set out as per the as per the Schedule of Prices at Annex B.

68. Implementation Phase:

Payment for the implementation phase will be made quarterly in arrears on the basis of fees and expenses incurred in the period.

Scale Up / Scale Down

69. FCDO reserve the right to scale up or scale down or discontinue this programme at any point in line with the Terms and Conditions. Scaling Down is at FCDO's discretion and may occur for reasons including but not limited to Supplier performance or shortage of funds.

Review Point

70. The Contract will be subject to a break point at the end of March 2025. Continuation of Contract beyond that point will be subject to satisfactory performance and progress against the agreed outputs. This will involve a

review 6 months before the break point to determine whether performance and achievements to date are sufficient to continue and the Supplier will be notified no later than 2 months before the break point whether the Contract will continue into the next Spending Review period or be terminated at the break point.

Contract Management Arrangements

71. FCDO will manage Supplier performance primarily through a logframe or alternative results framework, and progress against the agreed workplan.
72. The Contract will have a dedicated contract manager (SCALE's Programme Manager), alongside the FCDO SCALE team, who will be the primary contacts for agreeing workplans and who will be responsible for the day-to-day management of the Contract. In addition, the Supplier will liaise with other FCDO staff during the Contract. For each agreed output the Supplier will discuss the scope of work and methodology with FCDO as part of the inception phase process (see governance section above).
73. Communication with partners is a crucial part of this Contract. Therefore, once the Contract is awarded an introductory meeting will be set up between FCDO and the Supplier, and when other Suppliers have started a separate meeting to formally present the Supplier to programme partners.
74. Contact between the Supplier and implementing partners will be carefully managed. The Supplier will copy relevant FCDO contacts on significant correspondence with partners. However, the Supplier is required to engage in correspondence with each SCALE's partners directly to arrange the logistics of field visits. Where an issue arises, the Supplier is required to inform FCDO within a reasonable timeframe to resolve.
75. An understanding that field monitors are associated with an "agent" hired on behalf of British authorities, could have serious safety and security implications for them, partners, beneficiaries, and the continuation of projects. The communication strategy included in the inception report must explain how the Supplier plans to represent themselves to FCDO partners, their downstream partners and beneficiaries.
76. Each year FCDO will produce an annual review of the Supplier's performance and progress as per FCDO standard rules (end of March). All reports mentioned in the above reporting section will be used as the basis for assessing Supplier's performance.

General Data Protection Regulation (GDPR)

77. Please refer to the details of the GDPR relationship status and personal data (where applicable) for this project as detailed in Appendix 1 (Appendix 1 Schedule of Processing, Personal Data and Data Subjects).

Appendix 1 of Call-down Contract (Terms of Reference)
Schedule of Processing, Personal Data and Data Subjects

This schedule must be completed by the Parties in collaboration with each-other before the processing of Personal Data under the Contract.

The completed schedule must be agreed formally as part of the contract with FCDO and any changes to the content of this schedule must be agreed formally with FCDO under a Contract Variation.

Description	Details
Identity of the Controller and Processor for each Category of Data Subject	<p>The Parties acknowledge that for the purposes of the Data Protection Legislation, the following status will apply to personal data under this Call-down Contract:</p> <p>1. FCDO is the Controller and the Supplier is the Processor in accordance with Clause 33 (Section 2 of the contract) of the following Personal Data:</p> <ul style="list-style-type: none">NamesEmail addressesJob titles