



Terms of Reference

Consultancy to conduct ‘Uddokta Phase II’ Endline Study

1. Organizational Background

iDE (International Development Enterprises) is a nonprofit organization dedicated to ending poverty. With over 40 years of experience, iDE is a pioneer in market-based development. Our work within agriculture, sanitation, climate change resilience, and gender equality stands out because we don't simply provide handouts. Instead, iDE believes in powering small-scale entrepreneurs and building robust market ecosystems that lay the groundwork for low-income and marginalized people to prosper on their own terms. iDE has almost 1,300 global staff and offices in 10 countries across Africa, Asia, and Central America.

iDE established its first country program in Bangladesh in 1983. Today, it's the longest-standing NGO specializing in market systems in Bangladesh. Our diverse portfolio spans across agricultural markets, water, sanitation, and hygiene (WASH); renewable energy; and climate-smart technologies.

2. Project Background

The "Uddokta – Empowering Entrepreneurs" project, funded by Chevron and implemented by iDE under the Chevron Bangladesh Partnership Initiative (BPI), aims to enhance the financial stability and capital reserves of 53 targeted VDO cooperatives in Sylhet Sadar and Nabiganj Upazilas. By fostering business intelligence, financial discipline, and proactive engagement among cooperative members, Uddokta Phase II seeks to catalyze sustainable economic growth and resilience. Initiatives have included the development of business plans aligned with market demands, capacity-building in profitable trades such as beef fattening and garment manufacturing, and targeted nutritional interventions in collaboration with Latter-day Saint Charities. This holistic approach underpins our commitment to transforming the economic landscape of rural Sylhet through innovative and sustainable market-driven solutions.

The core objective of Uddokta Phase II is to empower these cooperatives to initiate and expand their business ventures, thereby fostering economic growth and sustainability. The project is dedicated to improving the financial resilience of VDO Cooperatives by introducing innovative business models, strengthening financial practices, and enhancing overall cooperative capacity. This strategic approach aims to ensure that interventions are not only effective but also enduring.

Since the beginning of 2024, Uddokta Phase II has made considerable progress, establishing a foundation for dynamic and sustainable interventions. Notable achievements include the development and integration of business plans for VDO-cooperatives that align with emerging market demands and operational sustainability.

These cooperatives have ventured into profitable trades such as beef fattening and small-scale garment manufacturing, expected to significantly improve local economic development.

In addition to business development, the project has conducted training programs, markedly improving the skills and engagement of cooperative members. These sessions have equipped members with the necessary skills to manage and expand their business ventures effectively. The project has supported 53 VDO-cooperatives and 60 women sales agents, achieving significant results through innovative business models and strategic co-investments.

Uddokta Phase II builds on the learnings of the previous project phase and seeks to scale and replicate effective business models across new cooperatives and regions. This phase integrates improved market linkage strategies and technological tools to enhance the business competencies of the cooperatives. A context-specific strategy of partnering with local governments, technical experts, and financial institutions ensures a collaborative development approach that addresses economic, social, and technical challenges comprehensively.

Long-Term Impact and Sustainability:

Since its inception, the Uddokta project has empowered numerous cooperatives in the region. By shaping entrepreneurial acumen and providing essential tools and training, the project has supported the start and continuation of VDO cooperatives into thriving business enterprises, making a lasting positive impact on the local economy. As the project adapts to the evolving needs of the cooperatives and market dynamics, it ensures that the benefits delivered are both impactful and sustainable for cooperatives to continue beyond the project.

- 3. Project Goals and Specific Objectives:** The primary objective of "Uddokta Phase II" is to Improve the financial sustainability of the cooperatives. This will be achieved by focusing on the development and execution of robust business plans that ensure profitable activities, which in turn, will sustain these cooperatives in the long run. The project also aims to provide comprehensive support to these cooperatives in areas such as entrepreneurial skill enhancement, forging beneficial partnerships, market identification, and effective product or service promotion.

Impact	To improve the income and livelihoods of the people in Chevron’s catchment communities through enterprise development.
Goal	Improve the financial sustainability of 58 Cooperatives in Sylhet Sadar , Nabiganj, and Jagannathpur Upazilas
Results	<p>Result 1: Business Intelligence - Targeted Cooperatives adopt and deploy comprehensive business planning and investment capacity, skills, and acumen for all co-investments made with the project.</p> <p><i>Indicators:</i></p> <ul style="list-style-type: none"> ● 58 Cooperative business plans developed and approved for investment ● Number of members actively participating in the Cooperative business
	<p>Result 2: Financial Discipline - Targeted Cooperatives are able to generate revenue, increase capital reserve, and make co-investments through the business initiatives.</p> <p><i>Indicators:</i></p> <p>80% of target Cooperatives are generating revenue from business activities 80% of Cooperatives increase their capital reserves by an average of 15-20% Target Cooperatives co-invest an average of USD 3,000 into their businesses</p>

4. About the Assignment

Background:

iDE is seeking a reputable evaluation firm to undertake the endline study for the Uddokta Phase II project across its operational zones in Sylhet and Nabiganj. The project, which began with a detailed baseline assessment in 2023, has set precise objectives and performance indicators outlined in its comprehensive project proposal. These indicators serve as critical benchmarks for evaluating the project's success and guiding the project team's strategic planning and execution efforts.

Since the initiation of Uddokta Phase II, quantitative and qualitative data have been consistently gathered through an advanced Management Information System (MIS). This system has enhanced understanding of the direct impacts and facilitated real-time adjustments to project strategies. The ongoing monitoring and results measurement (MRM) component is integral to the approach, ensuring that outcomes are rigorously assessed and methodologies refined to meet the evolving needs of the target communities.

As the project approaches its concluding phase, scheduled to end in September 2024, a comprehensive endline study is required. This study will measure the final outcomes against the established indicators and provide insights into both the achievements and areas for improvement. The findings will be crucial for iDE to evaluate the overall effectiveness and impact of the interventions and to shape future initiatives.

The selected firm will be expected to collaborate closely with the Uddokta Phase II team, employing a mixed-methods approach to rigorously assess the project outcomes. This final evaluation will focus on key areas such as business intelligence, financial discipline, cooperative member engagement within the cooperatives served by the project, VDO-Cooperatives profile, and business guideline. This assignment is pivotal for providing actionable insights that will inform the strategic direction of subsequent programming and ensure that the achievements of Uddokta Phase II have a lasting impact on the project catchment area.

5. Objectives of the Assignment

The overall objective of this endline study is to assess the impact of the Uddokta Phase II project on the targeted cooperatives and their members. The study aims to provide comprehensive quantitative and qualitative analyses of specific indicators from baseline to endline, offering insights into the project's achievements, challenges, and lessons learned. The specific objectives of the endline study are as follows:

1. **Evaluate Project Achievements:**
 - Measure the changes in financial sustainability and capital reserves of the 53 selected cooperatives, 583 members and 60 Women Sales Agents.
2. **Assess Business Intelligence and Financial Discipline:**
 - Evaluate the effectiveness of business plans and capacity-building activities in enhancing entrepreneurial skills and business acumen among cooperative members.
 - Assess the financial growth, revenue generation, and capital reserve increases among the cooperatives.
 - Identify the key barriers and challenges faced in achieving business intelligence and financial discipline. Investigate why some VDOs lagged behind in these areas and determine the key takeaways and lessons learned for future improvement.
3. **Identify Key Successes and Challenges:**
 - Document the key successes and positive outcomes achieved through the project intervention, and identify the challenges faced during the project implementation .
 - Identify the challenges faced during the project implementation.
 - Analyze who else is undertaking similar initiatives, how our approach differs, and what successful strategies from others could be adopted.
4. **Evaluate Cooperative Sustainability:**
 - Determine the progress made towards ensuring the long-term sustainability of the cooperatives by assessing the role of co-investment strategies in fostering ownership and self-reliance among cooperative members.
 - Identify the barriers and challenges to achieving sustainability and self-reliance.

- Collect feedback and level of engagement from GoB departments, local communities, and other stakeholders on their experiences and perceptions of the project.
 - Analyze who else is undertaking similar initiatives, how our approach differs, and what successful strategies from others could be adopted.
5. **Provide actionable Recommendations:**
 - Develop recommendations for improving the design and implementation of future initiatives aimed at cooperative development and enterprise sustainability.
 - Suggest strategies for scaling and replicating successful business models across new cooperatives and regions.
 6. **Contribute to Knowledge Management:**
 - Prepare a presentation to share findings and insights with relevant stakeholders, including donors, partners, and other development practitioners, at the project closing event.
 7. **Develop VDO-Cooperative Profiles:**
 - Create comprehensive profiles for 53 VDO-cooperatives along with their members in the VDO., documenting their business activities, growth, challenges, and recommendations.

Geographic Area Distribution of the Assignment

Geographic Area Distribution

The Uddokta Phase II project targets cooperatives in specific geographic areas within Bangladesh, primarily focusing on regions within Chevron’s catchment areas. The geographic distribution is designed to ensure comprehensive coverage and effective evaluation of the project’s impact. The endline study will cover the following geographical regions:

Table 1: Geographic Distribution

District	Upazila	Rationale
Sylhet	Sylhet Sadar	This area has been considered under the Chevron Casement area
Habiganj	Nabiganj	

Suggested Approaches and Methodologies

The endline study for Uddokta Phase II requires a robust and multifaceted approach to accurately assess the project’s outcomes, impacts, and sustainability. The methodologies suggested below are designed to capture a comprehensive view of the project’s achievements and areas for improvement. The methods and approaches presented below are suggestions from iDE; however, the consultant will be allowed to apply any appropriate methods for the endline study in consultation with iDE.

1. Mixed-Methods Approach

Quantitative Methods:

- **Surveys:** Utilize structured surveys and questionnaires to collect numerical data from the cooperatives. This data will provide measurable evidence of progress against the project’s quantitative indicators such as revenue growth, capital reserve enhancement, and member participation rates.
- **Financial Analysis:** Analyze financial records of cooperatives to assess revenue generation, capital reserves, and co-investment levels.

Qualitative Methods:

- **Focus Group Discussions (FGDs):** Conduct FGDs with cooperative members, local communities, and stakeholders to gather detailed insights into experiences, challenges, and successes of the project interventions.
- **In-Depth Interviews (IDIs):** Conduct IDIs with key informants such as cooperative leaders, project staff, and local authorities to gain detailed perspectives on the project's interventions and impacts.
- **Case Studies:** Develop case studies to highlight specific success stories and challenges encountered by the cooperatives.

2. Data Collection Tools

- **Digital Data Collection Tools:** Develop and utilize digital data collection tools, such as mobile applications or online survey platforms, to streamline the data gathering process and enhance data accuracy.
- **Pre-Test Tools:** Pre-test tools with a small subset of the target population to refine questions based on preliminary feedback, ensuring clarity and relevance.

4. Data Analysis Techniques

- **Quantitative Analysis:** Use statistical software to perform descriptive and inferential statistics. Analyze trends over time by comparing baseline and endline data to evaluate the progress made on key indicators.
- **Qualitative Analysis:** Thematic analysis will be applied to identify common themes and patterns from interviews and discussions, focusing on barriers and facilitators to business intelligence and financial discipline, the role of co-investment strategies, and feedback from local communities and stakeholders on project impact. Coding software (e.g., NVivo, ATLAS.ti) will be utilized to systematically organize and categorize qualitative data, ensuring a thorough and detailed analysis. Comparative analysis will be conducted to align qualitative findings with quantitative data, providing a comprehensive understanding of the cooperatives' performance and assessing alignment with expected standards such as increased member engagement, improved financial practices, and sustainable business growth.

5. Ethical Considerations

- **Informed Consent:** Ensure that all participants provide informed consent before participating in the study.
- **Confidentiality:** Maintain the confidentiality of all data collected and ensure that information is used solely for the purposes of the study.
- **Cultural Sensitivity:** Conduct the study in a culturally sensitive manner, respecting local customs and norms.
- **Ethical Clearance:** Obtain ethical clearance from an appropriate review board if required.

7. Population Groups

The endline study for Uddokta Phase II will focus on the following population groups to ensure a comprehensive assessment of the project's impact and outcomes:

Below is the sample size table:

Category	Total Count
VDO Cooperatives	53

VDO Members	583
Women Sales Agents	60
Total	696

Sampling Techniques

The consultant should propose a robust sampling methodology that ensures a proportionate representation of each target population from all geographic locations. The proposed sampling techniques should capture the diversity in geographic location, type of business activity, and stage of business development.

Ethical Considerations

6. **Informed Consent:** Ensure that all participants provide informed consent before participating in the study.
7. **Confidentiality:** Maintain the confidentiality of all data collected and ensure that information is used solely for the purposes of the study.
8. **Cultural Sensitivity:** Conduct the study in a culturally sensitive manner, respecting local customs and norms.

9. Major Responsibilities of the Firm

The composition of the study team is left up to the consultant/organization based on their internal system, ideas, and logic. However, iDE recommends that the team comprise one Team Leader (TL) to coordinate/conduct the overall study and liaise with iDE. To collect information from the field, an adequate number of Field Enumerators (FEs) will be deployed in the facilitation of iDE's Project Officers at the Districts/Unions. Supervision of the fieldwork and quality (reliability and validity) of the data/information collected from the field is the primary responsibility of the TL. The TL will work closely with the iDE M&E Unit and Project Team. In each step and process, consultation with the Project Manager, M&E Specialist, and District/Upazila Field Teams are crucial. The consultancy/consultant team will be primarily responsible to:

- a) Visit iDE Dhaka and Uddokta project office in Sylhet and hold interactions with M&E Expert and Uddokta core team to get acquainted with the project, its activities, and the proposed work.
- b) Prepare and share a detailed plan of action/schedule for the end-line study, covering orientation to enumerators, fieldwork, data collection, analysis, interpretation, draft, and final report preparation with concerned project staff.
- c) Prepare a detailed methodology for the endline study including sample size calculation, review questionnaires with reference to the Baseline survey and checklist for focus group discussion (if applicable and possible), and key informant interview as per the project documents and project IRAP document mainly focusing on indicators.
- d) Pre-test draft endline questionnaire, incorporate iDE inputs/feedback, and circulate the final version of the questionnaires to iDE for approval before pre-test deployment.
- e) Develop the questionnaire into a digital data collection platform, i.e. Kobo Toolbox.
- f) The inception report inclusive of the pre-tested and digitized questionnaire should be approved by iDE prior to full data collection.
- g) Debrief/discuss with the project team about the effectiveness of the questionnaire, checklists, and other tools used in the pre-test, collect feedback and finalize them.
- h) Orient, train, and supervise the enumerators - including key iDE training points - and collect the data in an ethical manner for the endline study.
- i) Ensure the quality of information collected from fields, cross-check the validity of information collected, and verify/revise where needed.
- j) Submit a brief analysis plan of how the key indicators will be responded to along with the Inception

report. Also, update progress of the study on a weekly basis to the E&A Expert.

- k) Analyze data (using R/SPSS/Excel/other statistical analysis software), submit the analyzed data and analysis code to iDE, and prepare quality reports.
- l) Share the draft report and give a presentation on the draft report to iDE, and
- m) Prepare and submit a final report (a compiled version of the report - both hard copy and electronic version in Microsoft Word format) to the project after incorporating the feedback and suggestions from iDE.

**The consulting firm must obtain approval from iDE for all key documents and processes outlined above.

10. Major Responsibilities of iDE

iDE will provide the consultant/firm with the necessary support to undertake and implement the assignment and execute the objectives of this assignment. Such responsibilities include the following:

- Provide programme documents and approve the work plan
- Support to finalize the methodology
- Lead the development of research questions, and develop tools and questionnaires.
- Supervise data collection, cleaning, and data transcription
- Review and approve the data analysis plan
- Supervise data collection and arrange a presentation on analyzed data
- Approve table of contents and provide feedback on the draft report
- Approve the final report
- Disbursement of payment as per the agreed schedule in the contract

By fulfilling these responsibilities, iDE will ensure that the Endline study is conducted seamlessly, aligns with the project's objectives, and offers valuable insights for the project's future trajectory.

11. Tentative Task Schedule

The consultant/firm is expected to start work on or around **August 15th, 2024**. This assignment should be completed within the **30th of September 2024**, which includes the completion of all tasks in the assignment along with the submission of the deliverables as detailed in Section 11. Based on unavoidable circumstances, the period for conducting the assignment might change based on joint discussion and agreement.. The consultant/firm is expected to be able to accommodate these changes without additional cost. A final detailed work schedule will be determined during the kick-off meeting.

Indicative Work Plan							
Activities	Month 1			Month 2			
	W1	W2	W3	W4	W5	W6	W7
Contract signed							
Inception report, work plan and methodology submitted and approved							
Development of data collection tools and questionnaire							
Finalize and approve endline study data collection tool							
Training of enumerators & pre-testing of the							

questionnaire							
Data collection for endline study							
Data cleaning, processing, and sharing of database							
Data analysis and presentation of findings							
Submission of draft report							
Feedback incorporation and submission of final report							

The firm/consultant is expected to adhere to this tentative task schedule. However, based on unavoidable circumstances, the period for conducting specific tasks might change. The firm/consultant is expected to be able to accommodate these changes without additional cost. A final detailed work schedule will be determined during the kick-off meeting with iDE.

12. Deliverables and Schedule of Payment

The financial proposal (format attached) should include expert and data enumerator's fees and expenses (including travel costs, accommodation & food expenses, etc.). The payment will be made in three installments as follows:

Deliverable	Timeline for Completion	Installment Values
Deliverable 1: Inception Report including approved work plan, methodology, questionnaire(s), etc.	20 Aug 2024	30%
Deliverable 2: Dataset of sample beneficiaries and VDO-Cooperative selected from the field based on selection criteria for the endline study	05 Sep 2024	30%
Deliverable 3: Draft endline study report including all collected data, initial insights, VDO-Cooperative profiles, and business recommendations.	20 Sep 2024	
Deliverable 4: Final Endline Study Report, VDO-Cooperative profiles, and business recommendations with feedback incorporated, presented, and submitted in both hard and soft copy.	30 Sep 2024	40%

Note: Government VAT and tax regulation will be applied, and these costs must be included in the financial proposal.

The following terms and conditions will apply:

- The payment will be made through account payee cheque/ wire transfer (account name, number, type, bank name, and branch name is required for wire transfer);
- As per Government of Bangladesh VAT and tax regulation; International consultants are taxed at 15% VAT (on contract amount) and 20% tax (on contract amount +VAT); National consultants are taxed at 15% VAT and 10% tax;
- Government VAT and tax regulation will be applied and iDE Bangladesh will deduct all relevant VAT and Tax at source as per GoB rule;
- VAT Registration Certificate, TIN and Trade License (if applicable) must be submitted before the

agreement is signed;

- In case of failure to deliver the final product in due time, iDE Bangladesh will deduct .05% of the total agreement amount for each day of delay in submitting the report beyond the closing date of the agreement;
- The selected consultant/firm will abide by other terms and conditions of iDE Bangladesh. that any research activities cause unanticipated harm.

iDE reserves the right to review processes on all above noted items at any point during the agreement in order to ensure that all do no harm principles are being appropriately adhered to. iDE may request supporting documentation for any and all items including training materials, data instruments, and informed consent materials.

Any document, information or data entrusted to or produced by iDE in connection with this assignment shall be strictly confidential and cannot be used by the contract employee for any other purpose without the written consent of iDE. This provision shall remain valid even after the completion of this assignment. iDE reserves the right to terminate this agreement at any time with the consultation of the contracted individual/firm.

13. Guidelines for Submission of the Proposal

These guidelines shall ensure uniformity of proposals submitted by all applicants and transparency of the evaluation process.

a) Eligibility Criteria

Eligible applicants are research organizations with an appropriate setup (fully equipped with physical facilities and competent team members) to conduct this task. The applicant must meet the following criteria.

- The consultancy firm must have 10 years of experience in undertaking impact evaluations of bi-lateral and multilateral organization with report submission as proof
- Demonstrated experience with market system research/study/survey/impact assessment, especially focusing on Market Systems Development (MSD) and business developments for Cooperatives approach
- Proven experience conducting project progress tracking studies on market-based interventions in a rural setting

b) Bid Submission & Evaluation Criteria

Consultant will be evaluated based on following criteria. The key factors stated below will be taken in consideration during the evaluation process-

- Previous work experience
- Methodological/technical aspects of carrying out the study
- Financial aspects (consultant fees, breakdown of activity costs, etc)

The language of the proposal should be English. The proposal must be submitted in PDF format, a maximum of 8 pages (not sheets) excluding the Cover Page, Abbreviations, Glossary, Table of Contents, Additional Documents, and Annexes. Page size A4;

Additional Documents			
1	If applicable, please also include: <ul style="list-style-type: none"> ○ Company profile ○ VAT Registration Certificate ○ TIN Certificate ○ Joint Stock Company Registration Certificate ○ Trade License Certificate 	--	As required

Interested firms are requested to submit their Technical and Financial Proposal to bangladesh.procurement@ideglobal.org. Please write “**Endline Study for Uddokta Phase II Consultancy**” in the subject line. The proposals should be submitted by **11.59 pm BST on Tuesday, 06 August 2024**. We are only able to consider electronic submissions. Only shortlisted firms will be contacted and invited for a technical discussion.