



**GENERAL SECRETARIAT OF THE ORGANIZATION OF AMERICAN STATES  
STRATEGIC COUNSEL FOR ORGANIZATIONAL DEVELOPMENT AND  
MANAGEMENT FOR RESULTS  
DEPARTMENT OF PLANNING AND EVALUATION**

**Call for Resumes:**

**External Evaluation of the Project: “Implementation of the Energy and Climate Partnership  
of the Americas” Phase V**

**Type of Appointment:** Individual consultancy

**Organizational Unit:** Department of Planning and Evaluation

**Duration:** approximately 4 months (35 non-consecutive days).

**Consulting Fee:** based on experience, education and skills

**Duty Station:** Washington DC, Member Countries and consultant’s place of residence

**Deadline:** no later than July 24th, 2020 to Jacqueline Cook at [jcook@oas.org](mailto:jcook@oas.org)

**Profile:** The Consultant must demonstrate a minimum 10 years of expertise in project and program evaluation. Experience in energy matters, and/or institutional strengthening will be a plus. The Consultant should also have attained a graduate degree in public policy, economics, management or related area; and experience working in Latin America and the Caribbean. The Consultant must be proficient in English, both oral and written. Proficiency in Spanish is not required but desirable. Experience working with an international organization in the Americas and in the evaluation of similar projects is a plus.

## I. BACKGROUND

1.1 At the request of the US Permanent Mission the Department of Planning and Evaluation (DPE) is coordinating an external assessment of the program Energy and Climate Partnership of the Americas Clearinghouse (ECPA Clearinghouse), Phase V. As with the evaluation of Phase IV in 2017, this assessment is part of the DPE greater efforts to conduct formative and summative evaluations of projects and programs executed by the OAS. Such efforts, coordinated and supervised by the DPE, began over 10 years ago with the evaluation of initiatives financed by the Spanish Fund for OAS and has been extended to operations financed by other donors, such as Canada and the United States of America. These evaluations, in addition to systematizing and documenting the results of the interventions, have the goal of capitalizing on these experiences for the improvement of future project and program formulations and designs, and institutionalizing best practices in monitoring and evaluation within the Organization.

### **Energy and Climate Partnership of the Americas Clearinghouse (ECPA Clearinghouse)**

1.2 The ECPA has its beginnings at the April 2009 Summit of the Americas in Port of Spain, Trinidad and Tobago, where the leaders of the Americas underscored that energy is among the most important issues confronting the future of the Americas, and reaffirmed their commitment to work together toward a clean energy future. The ECPA Clearinghouse project was developed to address these concerns and systematize information exchange, dialogue and cooperation among governments, NGOs, the private sector and academia with the ultimate goal of affecting the course of clean energy and climate policies and actions in the Western Hemisphere. To this end the project and the OAS took advantage of their network of energy experts, government officials, NGOs, and businesses to engage them in on-going dialogue through a ministerial meeting, workshops and specialized forums, direct engagement with stakeholders at the national, regional and international levels as well as social networks. It was expected then that this combination of tools would allow for the implementation of both bottom-up and top-down approaches to Partnership dialogue, collaboration and trust.

1.3 The OAS Department of Sustainable Development (DSD) has operated the ECPA Clearinghouse since 2009. In this capacity, it has facilitated sustained dialogue and technical cooperation on energy among key stakeholders in dozens of meetings, workshops, forums and other gatherings, as well as several projects. In April 2010, the OAS also hosted the Energy and Climate Ministerial of the Americas jointly with

the Inter-American Development Bank, and worked in close collaboration with the Government of Mexico to support a second ECPA ministerial in Merida, Yucatan, on May 25-26, 2015, in conjunction with the 6th Clean Energy Ministerial.

- 1.4 In addition, the OAS/DSD has built several tools to enable regional dialogue, foster knowledge sharing and support the implementation of energy initiatives across the Americas under the ECPA umbrella. These tools include regional technical workshops, public discussion forums, a bilingual website and monthly newsletter, and social media sites on Facebook and Twitter. Additionally, the OAS has established highly productive working relationships with a wide cross-section of partners at the behest of ECPA, thereby contributing to enhanced regional dialogue. Through technical cooperation, the OAS has built a robust network of national focal points, which are essential conduits for dialogue among nations seeking to establish priorities, share best practices, and promote common clean energy goals.

**Phase IV: ECPA Clearinghouse (SID-1408) (US\$1.2 million)**

- 1.5 The objective of the project's Phase IV was to strengthen dialogue and technical cooperation on sustainable energy practices, policies, laws and regulations, among governments, private sector, financiers, academics and other stakeholders. The subcomponents that were executed were as follows:

- i) Foster dialogue and awareness on sustainable energy policy development and practices among governments, academia, NGOs, and the private sector.
- ii) Increase the capacity of OAS member states through technical assistance and the exchange of best practices and lessons learned in sustainable energy among key stakeholders.
- iii) Promote ECPA as a hemispheric forum for dialogue and cooperation through the creation of information platforms.
- iv) Implement a new ECPA governance structure.

- 1.6 Phase IV finalized operations on June 2017 and a final evaluation was conducted between 2017 and 2018. In terms of effectiveness, the results indicate that, at the purpose level, the project contributed to strengthening dialogue and technical cooperation around sustainable energy and climate change, meeting its target of four new actions undertaken by participating countries during the project timeframe. ECPA also achieved three of its four outputs, providing five forums for stakeholder dialogue, disseminating information through a multi-pronged online presence, and implementing the project's new governance structure, the ECPA Steering Committee. The development and work of the Steering Committee was perhaps the greatest achievement of this

phase, firmly establishing member countries' commitment to and ownership of the project, an achievement that will contribute significantly to the project's sustainability.

- 1.7 However, the project fell short of achieving the target to enable technical cooperation and provide technical support all 20 participating countries. It did not address gender-differentiated issues related to energy and climate change and no research or stakeholder feedback related to these issues was undertaken, despite project documentation indicating it would.

**Phase V: Implementation of the Energy and Climate Partnership of the Americas (SID-1702) (US\$1.2 millions)**

- 1.8 The objective of Phase V was to strengthen the leadership and cooperation in energy infrastructure, energy efficiency, and energy integration at the regional level. The subcomponents that were executed are as follows:
- i) Facilitate a multi-sector forum on clean energy.
  - ii) Implementation of a technical cooperation on energy infrastructure, energy efficiency, and energy integration.
  - iii) Provide technical and administrative support to the ECPA Steering Committee and Ministerial Meetings.
  - iv) Disseminate information on the actions of ECPA geared toward advancing clean energy in the Americas.
- 1.9 The present evaluation will focus on Phase V achievements.

## **II. OBJECTIVE OF THE CONSULTANCY**

- 2.1 The objective of the Consultancy is to evaluate the relevance, efficiency, effectiveness and sustainability of the Phase V of the ECPA program. The evaluation will specifically focus on the delivery of the main Outputs, and the Immediate and Intermediate Outcomes for the project.

### **A. Scope of the evaluation.**

- 2.2 To achieve the objective the Consultant shall:
- Conduct a summative evaluation in order to identify the main achievements and results of the project.
  - Determine the efficiency and effectiveness of the project as best reflected in the available results.

- Critically analyze the formulation, design, implementation and management of the project and make recommendations as needed.
- Assess the institutional and financial sustainability of the interventions financed by the project.
- Document lessons learned related to the formulation, design, implementation, management and sustainability.
- Make recommendations, as appropriate, to improve the formulation, design and implementation for future similar interventions.
- Assess if and how the project addressed the crosscutting issue of gender perspective and to what results.
- Identify the social costs and economic and social benefits of the project to properly assess whether the benefits outweigh the costs of the operation. Specifically, conduct a cost benefit analysis by determining the internal rate of return and net present value of the investment at a 12% discount rate.

2.3 In addition to the above, the consultancy will make every attempt to answer the following performance questions:

- i) Was the project's implicit Theory of Change effective?
- ii) Were the project's objectives achieved? (Include a matrix to establish achievement and justification)
- iii) Were the identified outcome indicators appropriate to measure success?
- iv) Are the project's achievements sustainable institutionally and financially?
- v) Are the project's indicators S.M.A.R.T.?
- vi) Did the project team apply results-based management principles from inception to conclusion? Please describe which ones.
- vii) Was the process for the selection of beneficiaries conducted based on pre-established criteria? And, were the criteria appropriate?
- viii) Were best practices taken into account during the design and applied during the implementation?
- ix) Were lessons learned and recommendation from the previous evaluation of phase IV taken into account during the design and applied during the implementation of Phase V?

- x) Did the project include specific requirements for conducting follow-up of training activities in order to measure: increased capacity on energy matters, increased skills, awareness and abilities among recipients; and the strengthening of institutions where such individuals work, among others?
- xi) Was the monitoring mechanism used as an efficient and effective tool to follow-up on the progress of project's actions?
- xii) Are there clear examples of results that came from the partnerships and knowledge exchanges promoted by the project?
- xiii) Were there any unforeseeable/not planned results or outcomes?
- xiv) Are beneficiary countries, other Member States and donors willing to financially support the work of the ECPA Technical Secretariat?

#### **B. Information sources.**

2.4 Among other sources the Consultant will review the following:

- i) Project documents (Phases IV and V).
- ii) Progress implementation reports (Phase V).
- iii) Completion report (Phase V).
- iv) Project indicators identified and used throughout the execution (Phase V).
- v) Products derived from the implementation of the project and means of verification (Phase V).
- vi) Evaluation report (Phase IV)
- vii) Any other document deemed relevant for the completion of the work.

#### **C. Stakeholders.**

2.5 Among other stakeholders the Consultant will consider the following:

- i) Project Team.
- ii) Member States.
- iii) Local and national counterparts.
- iv) Donors.
- v) U.S. State Department.
- vi) Department of Planning and Evaluation, OAS.

- vii) Beneficiaries, individuals and Member States.

### III. ACTIVITIES

- 3.1 This consultancy will be coordinated and supervised by the Department of Planning and Evaluation (DPE).
- 3.2 The evaluation process will take a participatory approach and take account of the views of all key stakeholders. In general, the evaluation will be based on interviews, analysis of documents, use of relevant evaluation instruments (i.e. application of surveys, focus groups, etc.) and all available data sources, as required. **All conclusions and recommendations have to be based on evidence, not opinion.**

#### A. Phase I: Preparatory activities.

- 3.3 To achieve the objectives of the Terms of Reference, the consultancy shall carry out the following activities, without prejudice to other tasks that are necessary to complete the work:
  - i) Conduct initial conference calls with key stakeholders such as members of the Project Team, and the U.S. Permanent Mission to the OAS officials; and assess more accurately the scope of the work and request the necessary information to perform effectively. As a result, the consultancy will submit a preliminary work plan to the DPE/OAS, which will include the description and chronology of the activities to be carried out, the reports to be submitted, and the deliverables of the evaluation.
  - ii) Develop an Evaluation Framework (EF) after conducting the first wave of interviews, which will contribute to determine if the project was implemented efficiently and effectively, and generated the expected results. The EF shall include the following sections among other:
    - (a) A description of the methodology or design of evaluation strategy, including the sampling framework to be used for the collection of data; and the evaluation matrix. The methodology to be used to conduct the cost-benefit analysis. The evaluation methodology must consider qualitative and quantitative measurements.
    - (b) Data collection protocols and analysis of information.
    - (c) The identification of data collection instruments.

- (d) The identification and measurement of output and outcome indicators (initial, intermediate and final) to measure the project's efficiency and effectiveness, in addition to those previously identified during the design of the project, if any. Both groups of indicators are expected to include their definition and methodologies for the collection and calculation.
- (e) The instruments for the collection of information and related materials.
- (f) The updated work plan for the consultancy, including the collection, analysis and production of reports (see paragraph 3.3 (i));
- (g) A proposal of the table of contents of the final report, among others.

**B. Phase II: Collection and analysis of information, and Midterm Report.**

- iii) Review all the relevant documentation including those produced during the formulation and design of the project.
- iv) Conduct interviews and collect information from additional key stakeholders, including: government officials, and direct and indirect beneficiaries, among others (see paragraph 2.5).
- v) Conduct interviews and focus groups to validate the implicit chain of results (Logic Model) for the project, by determining if it was adequate and valid for the expected and actual results.
- vi) Establish the project's efficiency and effectiveness, identifying lessons learned and making recommendations for future executions. This assessment should include a robust cost-benefit analysis of the operation (CBA), by: identifying and quantifying the social and economic costs and benefits of the program; collecting the necessary data to validate the CBA proposal; conduct a literature review to support theoretically the social and economic costs and benefits and monetize them; estimate the returns to the investment by calculating the Net Present Value (NPV), and the Internal Rate of return at 12%.
- vii) Assess the management of the project in the use of planning and implementation tools, such as annual operations plans, logical framework, and project monitoring reports among others.
- viii) Assess the technical and economic feasibility of the project, including the sustainability of its benefits.

- ix) Determine the relevance of the criteria used for the targeting of beneficiaries; including member countries and agencies benefiting from the project and make appropriate recommendations for similar initiatives in the future.
- x) Analyze how and if the project incorporated a gender perspective approach in the execution of its components, and if there were any such efforts, determine how consequential they were. Were they relevant?
- xi) Measure the project's performance in terms of efficiency and effectiveness. The consultancy shall review and suggest adjustments to the indicators identified in the Logical Framework. In addition, the consultancy shall identify, propose and measure indicators that were not considered in the design. The consultancy shall analyze the extent to which the expected results were achieved, as well as identify unplanned results that may have occurred.
- xii) Produce a Midterm Report describing the progress of the evaluation and the findings to date. The report will be accompanied by a Power Point presentation.
- xiii) Present the Midterm Report to the project team and the donor.

**C. Phase III: Presentation of final report.**

- xiv) Produce a Final Report analyzing and describing the execution, outputs and outcomes of the supported actions; lessons learned, recommendations and conclusions; a section for sustainability and beneficiaries, among others. The report will be accompanied by a Power Point presentation.
- xv) Conduct one mission to OAS headquarters to present the Final Report (if possible).

#### **IV. PRODUCTS AND DELIVERABLES**

4.1 The Consultant will produce and deliver the following documents taking into consideration each of the activities described in the above section:

- i) A detailed preliminary work plan and the evaluation Framework **within 15 days** of signing the contract.
- ii) A Midterm Report on the progress of the consultancy including, a revised Logical Framework, the theory of change and a Power Point to be presented in OAS headquarters at a date to be agreed upon.

- iii) Final Evaluation Report including a cost-benefit analysis, all products mentioned above and a Power Point Presentation to be presented in OAS headquarters at a date to be agreed upon.

## V. TIMEFRAME & PAYMENT SCHEDULE

- 5.1 It is expected that the consultancy will require a total of 35 non-consecutive working days between July and November 2020.
- 5.2 The payment schedule is as follows:
- 15% Upon signing the contract.
  - 20% Upon delivery of a detailed Work Plan and Evaluation Framework
  - 30% Upon delivery of a Midterm Report accompanied by a Power Point presentation.
  - 35% Upon delivery of the Final Evaluation Report accompanied by a Power Point presentation

## VI. PROCUREMENT PROCESS

- 6.1 The contracting will follow the procurement processes outlined by OAS tender regulations, ensuring the application of competitiveness and transparency principles.
- 6.2 The Organization of American States does not discriminate against any individual on the basis of race, color, marital status, religion, age, gender, disability, sexual orientation, gender identity, or status as a parent.
- 6.3 Consultants interested in participating in the selection process should send the expression of interest and CV no later than July 24th, 2020 to Jacqueline Cook at [jcook@oas.org](mailto:jcook@oas.org)