

Terms of Reference

Monitoring & Evaluation and Knowledge Development Assistant *Officer for the European Union’s ‘Inclusive Societies’ Programme*

1. General Information

Type of contract	Freelance
Implementation period	May 2026–October 2027 (18 months)
Number of days	190
Place of assignment	Rome and remote, with possible travel to countries in Latin America and the Caribbean.

2. Inclusive Societies Regional Programme: Context, objectives and organisational chart.

The European Union’s Inclusive Societies Programme began on 4 December 2024, has a duration of 4.5 years, covers the LAC region and focuses on strategic countries identified in conjunction with the European Union and implementing partners.

The initiative aims to help reduce inequalities, strengthen social cohesion and promote a fairer, more inclusive and sustainable recovery. The Programme seeks to promote the social dimension of the Global Gateway (GGIA) in Latin America and the Caribbean, adopting a participatory and multilateral approach to the GGIA and providing an opportunity for collaboration among the public, private, and non-profit sectors in their respective roles.

The Global Gateway is a strategic roadmap for investment priorities in Latin America and the Caribbean. Its aim is to strengthen the EU-LAC partnership and build a better future for people and the planet. This agenda is crucial for accelerating progress towards just green and digital transitions, whilst adopting a 360-degree approach and taking the necessary steps to achieve the SDGs. It represents a shift in EU policy towards more policy-oriented external investment, focused on both promoting sustainable development and serving the EU’s political and economic interests. The Programme aims to reduce gender and other inequalities in the region, supporting the implementation of the social dimension of the GGIA with a 360-degree approach.

The Programme's overall objective is to contribute to the reduction of gender inequalities and other socio-economic inequalities, to reduce poverty and social exclusion, and to strengthen social cohesion within and between the countries of Latin America and the Caribbean.

The specific objectives are:

1. Improving equitable access to social rights, social services and justice, particularly for vulnerable groups (women, girls, boys, young people and households in the lowest 40% of income).
2. Strengthening public institutions that are more inclusive, transparent and equity-oriented, promoting gender-sensitive public finance models capable of reinforcing social policies and social protection systems.
3. Fostering new solutions and investments that drive social innovation, strengthen the resilience of social systems and promote fair, responsible and inclusive green and digital transitions.

The Programme is implemented by a consortium of European institutions led by the International Foundation for Public Administration and Policy in Ibero-America (FIAP) of Spain and comprising the Spanish Agency for International Development Cooperation (AECID), Expertise France (EF), the French Development Agency (AFD), German Cooperation (GIZ), the Italian Agency for Development Cooperation (AICS) and the International Italo-Latin American Organisation (IILA).

The initiative is implemented through three components: 1. Equality and social rights (led by EF), 2. Governance and citizenship (led by FIIAPP) and 3. Just transitions (led by IILA). Component 3, led by IILA, also involves EF, GIZ, AECID and AICS.

The programme's operational structure includes a Coordination Unit headed by EF, with FIAP and IILA also participating through programme officers.

3. Programme MEAL structure

The Programme began in December 2024 and, from the outset, has had a person responsible for MEAL functions who has developed a MEAL plan and a series of tools to ensure the monitoring and evaluation of results and to improve the relevance, coherence, effectiveness, efficiency, impact, and sustainability of the intervention.

The scope of the M&E Plan covers the Programme's three pillars of intervention – Social Rights, Governance, and Just Transitions – as well as its cross-cutting objectives of reducing inequalities, promoting gender equality, and strengthening institutional capacity.

As a multi-country and multi-component programme, Inclusive Societies requires a MEAL structure capable of coordinating diverse actions within a coherent, unified framework whilst preserving the specific nature of national contexts.

The MEAL functions can be summarised as follows:

- Guiding implementation and measuring progress through a monitoring framework with KPIs

that enables the tracking of activities, outputs and outcomes.

- Strengthen accountability and transparency by providing evidence of programme results to donors, partners and beneficiary populations.
- Support adaptive management by facilitating continuous learning and data-driven decision-making to adjust strategies.
- Strengthen institutional learning by systematising evidence and promoting continuous improvement.
- To promote knowledge sharing and policy advocacy by generating evidence to scale up good practices and inform public policy.

4. Context, objectives and functions of the consultancy

The person appointed as *Monitoring & Evaluation (M&E) and Knowledge Development (KD) Assistant Officer* will work with the *M&E and KD Officer* in the Programme Coordination Unit to support the development and implementation of the Programme's internal monitoring and evaluation system, as well as the design and coordination of a knowledge management system.

With advanced knowledge of planning, monitoring and evaluation methodologies and tools for EU-funded programmes; and with previous experience in monitoring and capitalising on results, particularly in relation to the OPSYS system, and experience in knowledge development, including management, organisation, capitalisation and transfer, the candidate will assist the M&E and KD Officer in ensuring the proper functioning of the internal system for monitoring, supervising and evaluating the Programme's results, including the collection of information for the various technical reports (half-yearly and annual).

In carrying out these tasks, in addition to reporting to the M&E and KD Officer, they will collaborate with the Programme Coordinator, the Head of the Coordination Unit, the Gender and Inequalities Officer, the Component Leaders and the *Project Officers* of all Components.

Overall objective: To support the strengthening of the Programme's comprehensive monitoring, evaluation and knowledge management (MEAL) system, ensuring its consistency with the logical and results framework, compliance with European Union requirements, and the generation of evidence for continuous improvement and informed decision-making

The specific objectives of the consultancy will be:

- To support the development, implementation and continuous improvement of the Programme's internal monitoring system, ensuring its consistency with the Programme's logical framework and results framework, as well as with the European Union's monitoring and reporting requirements.
- To support the development and implementation of the Programme's evaluation system, contributing to the planning, coordination and monitoring of the planned evaluation processes.
- To support the management, systematisation and capitalisation of knowledge generated by the Programme, contributing to the development of a knowledge management system that

enables the identification, documentation and dissemination of good practices, lessons learnt and relevant results.

In pursuit of these objectives, the following functions may be carried out (non-exhaustive and provisional list):

A. Support for the Programme's monitoring and follow-up system

- Contribute to the operationalisation of the Programme's indicator framework, including the development of any measurement tools and/or methodologies, data collection mechanisms, etc.
- Support the technical review of the Results Frameworks for the Programme's action sheets, assisting teams in the appropriate selection and application of outcome and output indicators, in order to ensure consistency and alignment with the Programme's Results Framework.
- Support the regular monitoring of progress on actions implemented across the various Components, analysing progress against expected results and established indicators.
- Support the consolidation of information in the Programme's monitoring tools, such as the Results Tracking Matrix (RTM), the GESCOOP information system and the beneficiary register.
- Support the verification of information sources and verification methods used for monitoring indicators, ensuring data quality control and guaranteeing the reliability, traceability and consistency of the data, as well as its proper classification in the relevant files.
- Support the integration of cross-cutting approaches, particularly gender and inequalities, within the Programme's monitoring system, including the collection of disaggregated data where appropriate.
- Where necessary, carry out monitoring missions in Latin American and Caribbean countries in relation to specific actions and/or multi-action roadmaps, and prepare reports.

B. Data management and reporting

- Support the collection, validation and consolidation of information from the various Programme components for the preparation of the Programme's technical reports, including half-yearly, annual and other reports requested by the European Union.
- Support the preparation of analytical inputs for progress reports, institutional presentations and follow-up meetings.
- Contribute to the preparation of information required for audits, reviews or external monitoring exercises.
- Support the regular updating of information in the INTPA Monitoring and Evaluation System (OPSYS), in coordination with the M&E and KD Officer.

C. Support for evaluation processes

- Support the planning and coordination of programme evaluations, including interim or final evaluations, where applicable.
- Contribute to the preparation of Terms of Reference for internal/external evaluations.
- Support the collection of information and the logistical coordination necessary for the conduct of evaluations.
- Support the monitoring of the implementation of recommendations arising from evaluations and monitoring exercises.

D. Knowledge management and capitalisation

- Support the development and implementation of a knowledge management system for the Programme.
- Contribute to the migration of data from the tracking and monitoring tools in Excel format (RTM) to the centralised information system (GESCOOP), ensuring the completeness and consistency of the information.
- Contribute to the identification, documentation and capitalisation of good practices, lessons learnt and Programme results.
- Support the preparation of knowledge products such as technical notes, case studies, capitalisation reports, thematic briefs and learning documents.
- To support the organisation of knowledge-sharing activities, such as seminars, workshops, webinars or learning events.
- Contribute to the systematisation of experiences and the dissemination of the Programme's results among partners, public institutions and other stakeholders.

❖ Internal coordination and support for the Components

- Support coordination with Component leaders and Project Officers to ensure the proper collection of monitoring data.
- Support capacity building for Programme partners and teams in the areas of monitoring, evaluation and knowledge management.
- Contribute to the preparation of methodological guidelines and practical tools for tracking results.
- Support the organisation of internal meetings related to results monitoring and knowledge management.

❖ Other duties

- Support the preparation of Terms of Reference for technical consultancy services related to monitoring, evaluation or knowledge management.
- Support the technical oversight of consultancy work related to these areas.
- Contribute to the continuous improvement of the Programme's monitoring and learning system.
- Participate in meetings, whether virtual and/or in-person, and undertake missions in Europe and Latin America and the Caribbean in the performance of these duties.

5. Activities and outputs

Activity/function	Possible deliverables	Indicative distribution of working days ¹
Functions supporting the Programme's monitoring and follow-up system	P1. Proposals for measurement tools and/or methodologies and/or data collection mechanisms. P2. Proposals for revising the 'Results Framework' sections of the Action Sheets. P3. Proposals for the revision and/or consolidation of the RTM/GESCOP/Beneficiary Registers/SIA tools P4. Documentation and verification sources associated with the indicators of the Actions of the 3 Components, reviewed, verified and validated, ensuring their reliability, traceability and consistency, as well as their proper classification in the relevant files. P5. Reports on results and recommendations from monitoring missions in Latin American and Caribbean countries, relating to specific actions and/or multi-action roadmaps.	90
Data management, information consolidation and reporting functions	P6. Proposals for the review/adjustment/consolidation of information from the various Programme Components for the preparation of the Programme's technical reports, including half-yearly, annual and other reports requested by the European Union. P7. Preparation of charts and visual representations of the data/results compiled during reporting exercises, for external presentation (using PowerBi or similar software). P8. Analytical inputs for progress reports, institutional presentations and follow-up meetings. P9. Inputs and information documents for audits, reviews or external monitoring exercises. P10. Inputs for the periodic updating of information in the INTPA Monitoring and Evaluation System (OPSYS), in coordination with the M&E and KD Officer.	35
Support for evaluation processes	P11. Inputs/proposals for the planning and coordination of programme evaluations. P12. Terms of Reference (ToR) for internal/external evaluations. P13. Documents containing comparative analyses of expert profiles for consultancy work and/or evaluations. P14. Inputs and documents for the collection of information and the logistical coordination necessary for the conduct of evaluations and/or for the implementation of recommendations arising from evaluations and monitoring exercises.	20
Knowledge management and capitalisation	P15. Inputs for the successful migration of data from the Excel-based tracking and monitoring tools (RTM) to the centralised information system (GESCOP). P16. Inputs for the identification/dissemination and analytical documents for the systematisation and capitalisation of good practices, lessons learnt and programme results. P17. Knowledge products such as technical notes, case studies, capitalisation reports, thematic briefs and learning documents. P18. Inputs, agendas and/or logistical notes for the organisation of knowledge-sharing activities, such as seminars, workshops, webinars or learning events.	30

¹ The allocation of the 190 working days is indicative and may be adjusted in line with any needs that arise in relation to the various duties envisaged.

Internal coordination and support for the Components	P19. Coordination meetings with Component leaders and Project Officers to ensure the proper collection of monitoring data. P20. Methodological inputs and guidance, and practical tools for results monitoring. P21. Organisation of internal meetings and/or workshops related to results monitoring and knowledge management.	5
Other functions	P22. Terms of Reference for general consultancy services related to monitoring, evaluation or knowledge management. P23. Technical and/or methodological review documents of the work of consultants engaged in areas related to monitoring, evaluation and knowledge management. P234. Terms of reference, agendas, minutes and/or reports of virtual and/or face-to-face meetings and missions carried out in Europe, Latin America and the Caribbean. P25. Other compilation documents addressing the need for data systematisation, monitoring, evaluation and knowledge.	10
	Total days:	190

7. Amounts and payment terms

→ **Daily rate:** 200 euros including VAT.

→ **Total amount:** 38,000.00 euros including VAT

➤ **Details regarding payments, status and technical monitoring:**

The framework contract sets out the general terms of collaboration, but does not imply a minimum spending commitment or an obligation to purchase all services. Payments will be made solely for services actually requested by the programme and delivered in each case. The maximum total amount and the number of days specified do not constitute an obligation.

To ensure payments are processed correctly:

- The expert must hold a valid registration as a self-employed professional and be formally registered under the applicable tax regime.
- Payment for services rendered will only be made once the deliverable(s) and timesheets have been validated by the Inclusive Societies programme team.
- Payment will be made against an invoice in accordance with the delivery of deliverables and upon submission of the relevant timesheets (if applicable under the contract).
- The invoice must comply with the requirements set out in the contract (project code, total amount including/excluding VAT, programme logos, etc.)
- Deliverables exceeding 50 pages must include an executive summary.

➤ **Place of work and specific conditions of the consultancy**

The consultancy will be based in Rome, Italy, with the possibility of missions to Europe, Latin America and the Caribbean, as required.

The successful candidate will work predominantly remotely, using digital tools, whilst ensuring the necessary availability to coordinate with the teams involved. However, the successful candidate must be present at the IILA offices in Rome for approximately four working days per month to meet with the M&E and KD Officer who will coordinate their work.

The successful candidate must hold a valid and up-to-date travel document allowing them to travel within the European Union and to countries in the LAC region.

The successful candidate must use their own computer equipment, equipped with a Microsoft Office licence and other basic requirements for data analysis work, to carry out the consultancy.

➤ **Costs covered by the programme**

Expertise France will be responsible for funding the following costs:

1. Fees for the expert providing technical assistance, in accordance with the number of days specified in the contract and the amount of the fees.

The Programme, through agencies other than Expertise France, may cover any expenses related to travel within the EU-LAC region to enable participation in project activities and/or monitoring and evaluation missions (travel, accommodation and subsistence expenses).

8. Conditions and responsibilities

EF's responsibilities:

- **Coordination:** Expertise France, together with the programme's MEAL manager, will be responsible for issuing requests for services and making approved payments.
- **Supervision:** Expertise France, together with the programme's MEAL manager, will carry out technical supervision of the services, verifying the quality, relevance and progress of activities in accordance with the approved work plan.
- **Authorisation and approval:** All deliverables must be validated by Expertise France. Final approval will be granted once the consultant has satisfactorily incorporated the adjustments and comments made by the programme's Coordination Unit.

Responsibilities of the expert:

- To comply with the work plan and deliver the deliverables within the established deadlines.
- Ensure the technical quality of all analyses and documents produced.

- Participate in coordination and monitoring meetings, as requested by the Coordination Unit
- Maintain timely communication, reporting on progress and any potential difficulties.
- Incorporate comments made by the Coordination Unit into the drafts.
- Respect the confidentiality of all information handled during the consultancy.
- Submit timesheets (if applicable) and the administrative documentation required for payments.

9. Required profile

➤ **Academic background**

- University degree in Social Sciences, Political Science, International Relations, Economics, International Development, Statistics, Project Management or related disciplines.
- Postgraduate studies or specialised training in monitoring and evaluation, results-based management (RBM), data analysis or knowledge management will be considered an advantage.

➤ **Professional experience**

- At least 2–5 years' relevant professional experience in monitoring and evaluation of international cooperation programmes or projects, preferably in programmes funded by the European Union or other international organisations.
- Proven experience in tracking results, data collection and analysis, developing indicator matrices and monitoring tools, and reviewing and validating indicator verification sources.
- Experience in supporting the formulation and review of results frameworks and indicators, including the definition of verification methods and data collection mechanisms.
- Experience in preparing technical reports, progress reports and other reporting outputs within the framework of international cooperation programmes.
- Experience in the management, systematisation and capitalisation of knowledge will be an advantage, including the development of knowledge products, the systematisation of experiences or the documentation of good practices.
- Experience in programme evaluation processes, including support for external evaluations, drafting terms of reference or collecting evaluation data, will be an advantage.
- Experience of working in Latin America and the Caribbean will be an advantage.

➤ **Technical knowledge**

- Solid knowledge of monitoring and evaluation methodologies, results-based management (RBM) and indicator tracking systems.
- Knowledge of the monitoring and reporting requirements for programmes funded by the European Union, including familiarity with systems such as OPSYS or other results reporting platforms.
- Experience in using IT tools for data management and analysis, including: advanced Microsoft Excel (database management, pivot tables, formulas, data analysis and

visualisation); Microsoft Office (Word, PowerPoint) for producing technical reports and presentations.

- Knowledge of additional data analysis or visualisation tools (e.g. Power BI, dashboard tools or other information management platforms) will be an advantage.
- Knowledge of cross-cutting approaches in international cooperation, particularly gender equality and the reduction of inequalities, will be viewed favourably.

➤ **Skills**

- Analytical skills and the ability to synthesise complex information.
- Ability to organise, systematise and manage large volumes of information.
- Ability to work independently and in coordination with multidisciplinary and international teams.
- Ability to facilitate learning processes and capacity building with technical teams.
- Excellent ability to draft technical reports and analytical documents.
- Ability to plan, organise work and manage deadlines.

➤ **Languages**

- Fluency in Spanish and English, both spoken and written.
- Knowledge of Italian would be an advantage.

➤ **Other requirements**

- Valid registration as a self-employed professional, through formal enrolment in the applicable tax regime.

10. Administrative and contractual provisions

➤ **Administrative provisions:**

These ToR form part of the contract to be signed between the expert and Expertise France.

The expert must present themselves to the counterparties as an independent professional recruited by the Inclusive Societies programme, Component 1: Gender Equality and Social Rights, without presenting themselves as part of the permanent staff of Expertise France or the institutions involved;

The conclusions, analyses and recommendations included in the reports or documents produced within the framework of the assignment shall reflect exclusively the personal and technical opinions of the expert.

These documents, which are of an unofficial nature, do not necessarily represent the positions of the European Union, France or the parties involved, a fact which must be clearly stated.

➤ **Delivery and submission of deliverables:**

All deliverables must be submitted on time on the agreed dates. The expert shall submit the final deliverables in electronic format, named in accordance with the request for services.

➤ **Intellectual property:**

The intellectual property rights to the documents and deliverables produced within the framework of the consultancy belong to the Inclusive Societies programme, which may use them freely at any time and for any institutional purpose.

➤ **Confidentiality:**

All information collected or produced during the consultancy shall be treated as strictly confidential. The expert shall not use, cite, disseminate or comment on such information or the products produced, unless expressly authorised to do so. To this end, a confidentiality clause shall be signed at the start of the contract.

➤ **Communication and visibility:**

All deliverables must comply with visibility requirements and use the Inclusive Societies programme logos in accordance with current guidelines and the programme's communication kit.

➤ **Other considerations:**

The expert must make any adjustments or modifications requested by the Coordination Unit prior to the final approval of the deliverables. Furthermore, they must participate in any follow-up meetings scheduled to monitor the progress, content and quality of the deliverables.

11. Application documents

- CV.