



TERMS OF REFERENCE

IDEA (International Development Education and Awareness) MIXED METHODS BASELINE SURVEY - CONSULTANCY

1. Position

Aga Khan Foundation Canada (AKFC) is seeking a consultant to lead the design and implementation of a mixed methods gender-sensitive baseline study for a new project, IDEA, that aims to enhance the engagement of youth in Canada's international development efforts towards the achievement of the Sustainable Development Goals (SDGs) and Canada's Feminist International Assistance Policy (FIAP), with a specific focus on global interconnectedness, gender equality, and the empowerment of women and girls.

2. AKDN and AKFC

The *Aga Khan Development Network (AKDN)* is a group of private, international, non-denominational agencies working to improve living conditions and opportunities for people in the developing world. The Network's organizations have individual mandates that range from the fields of health and education to architecture, livelihoods development, and the promotion of private enterprise. Together, they collaborate in working towards a common goal – to build institutions and projects that can respond to the challenges of social, economic, and cultural change on an ongoing basis.

Aga Khan Foundation Canada (AKFC) is an international development organization and registered charity. AKFC partners with Canadians and communities, businesses, and governments across Africa and Asia to promote inclusive development. Since 1980, AKFC has helped millions of people to unlock their own potential to build a better life. Working in Africa and Asia, the Foundation invests in local institutions and systems that anchor progress over the long term. In Canada, AKFC mobilizes funding and expertise, and promotes awareness of global issues. AKFC is an agency of the Aga Khan Development Network, one of the world's most comprehensive development organizations.

3. IDEA - Project Background

Designed in close discussion with Global Affairs Canada (GAC), Canadian educators, Canadian youth,¹ and Canadian NGOs, IDEA (International Development Education and Awareness), is a project executed and implemented by Aga Khan Foundation Canada (AKFC).

IDEA will **increase the understanding of international development issues among youth (aged 12 to 18) in Canada and improve their access to, and use of, equitably distributed global citizenship learning products, resources, and opportunities.** IDEA will engage youth through digital platforms and mass media accessed by young Canadians through school programs, extracurricular activities, and youth-focused organizations outside the formal education sector, as well as through both traditional and social media. Additionally, IDEA will create opportunities for youth to engage as emerging leaders in international development efforts, including through participation in relevant forums, events, and

¹ Canadian youth is used as shorthand to capture many categories that IDEA will reach including citizens, permanent residents, landed immigrants, and refugees, all of whom could benefit from this programming.

experiential learning opportunities.² These could include opportunities to co-design, alongside educators, innovative classroom activities focused on international development. Special emphasis will be placed on FIAP, Canada's role in the world in promoting gender equality and climate change adaptation, and Canadians' role in achieving the SDGs.

A sector-wide community of practice (CoP) comprised of NGOs, government, private sector, and media will be formed to **coordinate Canadian global citizenship education (GCE)** activities, leverage networks, and support sector-wide complementary campaigns and initiatives.

IDEA will reach an estimated 1.360 million beneficiaries across Canada— *youth aged 12-18* – through its direct interventions and via multipliers (682,633F; 668,979M; 13,654NB). IDEA will engage 5,266 intermediaries – *teachers, NGO staff, the private sector, and the media*. Special considerations have been made to ensure that 20% of beneficiaries and teachers are Francophone; 25% are rural or remote; 1% are Indigenous; 30% are non-Indigenous visible minorities.

Table 1: IDEA Reach Table - Beneficiaries and Intermediaries

| Beneficiaries | F | M | Non-Binary | TOTAL |
|---|----------------|----------------|---------------|------------------|
| Youth (12-18) - Francophone | 136,000 | 133,280 | 2,720 | 272,000 |
| Youth (12-18) - Rural/Remote | 170,000 | 166,600 | 3,400 | 340,000 |
| Youth (12-18) - Indigenous | 6,800 | 6,664 | 136 | 13,600 |
| Youth (12-18) - Non-Indigenous Visible Minorities | 204,000 | 199,920 | 4,080 | 408,000 |
| Youth (12-18) - Other | 163,200 | 159,936 | 3,264 | 326,400 |
| Total Beneficiaries | 680,000 | 666,400 | 13,600 | 1,360,000 |
| Intermediaries | | | | |
| Teachers - Francophone | 500 | 490 | 10 | 1,000 |
| Teachers - Rural/Remote | 625 | 613 | 13 | 1,250 |
| Teachers - Indigenous | 25 | 24 | 1 | 50 |
| Teachers - Non-Indigenous Visible Minorities | 750 | 735 | 15 | 1,500 |
| Teachers - Other | 600 | 589 | 12 | 1,201 |
| NGO Staff | 125 | 122 | 3 | 250 |
| Private Sector & Media | 8 | 7 | 1 | 16 |
| Total Intermediaries | 2,633 | 2,579 | 54 | 5,266 |
| Total | 682,633 | 668,979 | 13,654 | 1,365,266 |

4. Scope of the Mixed Methods Baseline Study

The IDEA mixed-methods baseline study will provide baseline data against key project performance framework (PMF) indicators outlined below.

² An experiential learning opportunity is likely to make people feel strong emotions – joy, sadness, or anger. By incorporating emotive situations into experiences for youth, such as games or group activities, they are more likely to recall the information they have gained or develop an empathetic response.



Table 2. IDEA PMF Indicators to be Collected at Baseline

| Outcome Area | Indicators | Data Sources | Data Collection Methods |
|---|--|------------------------------|--|
| Ultimate | | | |
| 1000 - Enhanced engagement of youth in Canada's international development efforts towards the achievement of the SDGs and FIAP, with a specific focus on global interconnectedness, gender equality, and the empowerment of women and girls | % of surveyed youth (ages 12-18) reporting to be 'engaged' in international development (disaggregated by geography, gender, age) | Youth in Canadian Classrooms | Survey |
| | Level of global citizen engagement of surveyed youth (ages 12-18) in international development (disaggregated by geography, gender, age) | Youth in Canadian Classrooms | Survey (primary), Focus Group Discussions (triangulation) |
| Intermediate | | | |
| 1100 - Increased understanding by youth in Canada of international development issues, global interconnectedness and Canada's efforts towards the achievement of the SDGs and FIAP | Level of understanding amongst surveyed youth about how major global challenges can affect local realities (scale 1-5) (disaggregated by geography, gender, age) | Youth in Canadian Classrooms | Online Survey (primary), Focus Group Discussions (triangulation) |
| | % of surveyed youth who understand how Canada's international development efforts contribute to alleviating global challenges (disaggregated by geography, gender, age) | Youth in Canadian Classrooms | Survey |
| Immediate | | | |
| 1110 - Increased access to opportunities for emerging youth leaders in Canada to actively participate in international development activities, which include topics of global interconnectedness, gender equality, SDGs and FIAP | % of surveyed youth who feel they have access to opportunities to engage and take leadership in international development (disaggregated by geography, gender, age) | Youth in Canadian Classrooms | Survey |
| | Level of satisfaction amongst participating youth related to access to opportunities to engage and take leadership in international development (scale 1-5) (disaggregated by geography, gender, age) | Youth in Canadian Classrooms | Online Survey (primary), Focus Group Discussions (triangulation) |
| 1120 - Increased knowledge of complex international development topics, including Canada's role in the promotion of gender equality and achievement of the SDGs, by Canadian youth | Perceived level of understanding of complex international development topics among surveyed youth (scale 1-5) (disaggregated by geography, gender, age) | Youth in Canadian Classrooms | Online Survey (primary), Focus Group Discussions (triangulation) |
| 1210 - Increased availability of gender sensitive and inclusive international development learning products for educators across Canada | Level of satisfaction amongst surveyed Canadian educators on availability of gender-sensitive, inclusive, and evidence-based international development learning products (scale 1-5) (disaggregated by geography, gender, age) | Youth in Canadian Classrooms | Online Survey (primary), Focus Group Discussions (triangulation) |



The baseline study data collection will be conducted across Canada, working through educators within schools. The survey processes will start on February 6, 2023, and will conclude by August 31, 2023.

The baseline study will be designed to ensure data is collected across five geographic zones (Atlantic, Central, Prairies, Western, Northern) capturing data from all communities including rural/remote, indigenous, non-indigenous visible minorities, and Francophones.

5. Objectives of the Baseline Study

The IDEA baseline study aims to establish a benchmark for measurement of the baseline status of indicators under the ultimate, intermediate, and immediate outcome level results of the project.

The specific objectives of the baseline study are:

1. To establish starting points or baselines for all indicators in the PMF, suggesting revisions in their formulation if needed.
2. To help validate the assumptions in the project's Theory of Change (ToC) and define targets of the indicators in the project's PMF.
3. To support a better understanding of the implementation contexts for IDEA at the onset of the project, including the needs of youth in Canada related to engaging in international development.
4. To provide recommendations for fine-tuning the project implementation strategy.

The baseline study will consider gender, geographic diversity, and social inclusion needs in the design of instruments, the protocols for administration (to the extent possible), and in the analysis framework.

6. Main Duties and Responsibilities

The consultant will be responsible for all components of the study, including:

- Developing the gender-sensitive study protocol, inclusive of the methodology, sampling plan, ethical protocols and procedures, data collection tools, study workplan, data analysis plan;
- Facilitating/enumerating recruitment and training;
- Data quality assurance;
- Data analysis; and
- Report writing.

Some of these components are further elaborated below:

Overall study approach: The baseline study will adopt a mixed methods approach, incorporating a quantitative survey and multiple qualitative research elements to provide nuanced, triangulated results and to ensure a clear picture of the 'baseline' status for each indicator assessed. Further, the study approach will provide a foundation for ongoing monitoring activities, and a strong evaluation at endline, based on the data collected.

Ethical Standards and Safeguarding: The baseline study must conscientiously abide by AKF's Global Safeguarding Manual and its adaptations in the study context, and all members of the consultant team (if applicable) must sign AKF's Safeguarding Statement of Commitment upon contracting.

The consultant must also obtain the relevant research permits, as required, from all relevant national/provincial authorities. AKFC will provide the consultant with a letter and all survey-related documentation as required by ethical review boards (if applicable). The consultant will be required to provide any documentation and details the government authorities may seek.

Codes of conduct must be specifically referenced, and commitment confirmed in writing by each researcher involved in this study. The design of the study must clearly specify how data collection and use will be undertaken with integrity and honesty, respecting human rights and differences in culture, customs, religious beliefs, and practices of all stakeholders. Provisions to obtain informed consent from study participants and ensure confidentiality and data security must be explicit. The consultant must explain how its researchers will be mindful of gender-related needs and roles, ethnicity, disability, age, language, and other differences when designing and carrying out the study. The design and implementation of the study must strike an appropriate balance between recognition of the potential benefits of the research, and the protection of participants from potential research-related harms. Safeguarding principles to protect key informants from sexual exploitation and abuse, sexual harassment, and bullying, including youth protection, must be explicit.

The consultant is also expected to follow national COVID-19 public health measures and international best practices when undertaking the baseline study in each geography. The consultant should also ensure that all participants in the data collection process are adequately protected and following recommended health precautions, especially those who are vulnerable when data collection is taking place in person.

Baseline sample: The consultant will be required to design a detailed survey protocol covering a sampling strategy with appropriate, representative, and manageable sample sizes for baseline data collection. A representative sample of youth, presented in Table 1 above, across all Canadian geographies should be identified for quantitative and qualitative data collection.

Data collection tools and methods: The consultant will develop the data collection tools and share them with AKFC for review before they are finalized. All data collection tools must be gender-sensitive and adapted to the local context and languages (English and French). The use of tools and the modalities of implementation will be proposed by the consultant.

Recruitment and training: The consultant will identify the appropriate mechanisms for data collection and will recruit and train the relevant stakeholders for the data collection process.

Data analysis: Quantitative data will be analysed quantitatively using statistical software such as SPSS, STATA, or other. This might include descriptive statistics such as frequencies and cross-tabulations. Qualitative data will be analysed for key themes and used primarily to triangulate and make meaning of quantitative findings, potentially using qualitative data analysis software such as NVIVO. The consultant's technical proposal will elaborate a robust data analysis approach that is aligned with the requirements outlined in this Terms of Reference, which will be further detailed in the inception report that will be produced by the successful bidder.



7. Deliverables

The main deliverables for this project are as follows:

- **Inception report:** A detailed inception report per the requirements agreed with AKFC. This is expected to include the following elements:
 - Study protocol covering methodology, design, and sampling strategy as well as proposed sample sizes for quantitative and qualitative components
 - Detailed work plan that includes all tasks to be completed by the consultant (and team members, if applicable). The work plan should incorporate the study timelines, and include contingency planning and scenarios for COVID-19-related issues
 - Level of effort (%) of each team member (if applicable)
 - Description of enumerator and facilitator training and piloting exercises
 - Data collection tools covering all the project indicators mentioned in the PMF
 - Data collection, management, and analysis processes
 - Detailed study budget
 - Gender equality, safeguarding, ethics, and risk management
 - A finalized data analysis plan which contains all definitions and computations for each project indicator, along with illustrative planned tables and figures (dummy tables)
- **Data collection:** Documentation of the following: 1) data collection tools translated (where translation is required), 2) ethical and other national government research approvals obtained, 3) data collectors recruited and trained, 4) data outputs tables; 5) data collection, entry (where applicable), and quality assurance completed.
- **Baseline study report:** Completed baseline study report including quantitative and qualitative baseline study findings, completed tables, data visualizations, and analysis of findings. The reporting structure should follow the requirements established with AKFC, and will include the following data as annexes:
 - **Baseline datasets:** Raw data and complete, cleaned datasets in English. The Consultant will also provide a fully 'cleaned-up' dataset in an agreed file format (e.g., XLS, SPSS) accompanied by the code used to carry out analysis and a variable codebook.
 - **Transcribed and translated transcripts:** Complete and edited transcriptions and translations of all survey responses, focus group discussions, and interviews conducted in English.
 - **Data interpretation workshop:** A presentation of the preliminary study results in PowerPoint format, to be delivered for feedback and validation to staff from AKFC (and potentially other partners, including GAC).
 - **Presentation of results:** A summary of the report results in English and French in PowerPoint format, highlighting key findings and recommendations for adaptive management.
 - **Final baseline study report:** final draft of the study report in English and French on agreed template including all findings, in publishable quality. The final report should take into consideration any comments or suggestions made by AKFC reviewers before it can be considered final.

Project milestones: Project milestones (see below) should be included in the bidder's work plans. Additional steps and details should be added. Modifications to deadlines may be proposed only with justification while respecting the overall deadline for submission of the final report.

Table 3: Project milestones

| 1. Inception Phase | Deadlines |
|--|---------------------|
| Consultant commences assignment | Feb 13, 2023 |
| First draft inception report, study protocol, data collection tools, with other annexes developed by consultant | March 10, 2023 |
| Feedback on first draft inception report submitted to consultant by AKFC | March 17, 2023 |
| Final draft inception report, protocols, tools, and annexes submitted to AKFC, and tools translated and back-translated for verification | March 31, 2023 |
| Ethical approvals process initiated (if required) | <i>Timeline TBD</i> |
| 2. Data Collection Phase | Deadlines |
| Data collectors trained and tools piloted. Tools revised as necessary following pilot. | April 14, 2023 |
| Data collected (both qualitative and quantitative) | May 5, 2023 |
| 3. Data Analysis and Reporting Phase | Deadlines |
| Draft quantitative data tables and preliminary qualitative findings developed and submitted | May 26, 2023 |
| Inputs on preliminary findings provided by AKFC (and other stakeholders) and incorporated by consultant | June 9, 2023 |
| Data interpretation workshop conducted by consultant, inviting relevant stakeholders involved in the study | June 23, 2023 |
| Draft baseline study report completed and shared | July 7, 2023 |
| Feedback on draft baseline study report provided by AKFC | July 21, 2023 |
| Baseline study report finalized | Aug 4, 2023 |
| Submission of final report to AKFC | Aug 4, 2023 |

8. Qualifications

Bidders are required to provide CVs for all those proposed in the Study Team, clearly stating their roles and responsibilities for this baseline study. *Any changes to the team must be provided to and approved in writing by AKFC.*

Please note that the lead consultant will be ultimately responsible for the enumerators and facilitators they are subcontracting to.

The consultant/proposed consultant team should include the technical expertise and practical experience required to deliver the scope of work and evaluation outputs, in particular, with regards to:

- Minimum of 10 years of experience in designing and administering studies, collecting data, and producing quality mixed-methods baseline study reports, with specific experience in conducting studies with youth and in schools, preferably for international non-profit organizations or multilateral agencies and multi-country studies.
- Demonstrated experience recruiting, training, and managing enumerators and facilitators for both quantitative and qualitative studies
- Demonstrated experience in quantitative data and statistical analysis, using software such as SPSS or Stata.
- Demonstrated experience in qualitative data analysis techniques, including the use of relevant software.



- Demonstrated experience in employing Open Data Kit (ODK) or other computer-assisted personal interviewing software.
- Demonstrated experience in data management, including designing and managing gender- and age-disaggregated data and information systems capable of handling large datasets for study purposes.
- Demonstrated experience in safeguarding and responding to the needs of intersecting youth identities, including indigenous, LGBTQI2S+, and BIPOC youth. Fluency in English and French is mandatory.

9. Application Package

Qualified and interested parties are asked to submit the following:

1. Letter of interest, including the names and contact information of two previous clients who can be contacted regarding relevant experience. Consultants are also expected to disclose any conflict of interest related to this mandate with AKFC.
2. Detailed **technical proposal** of not more than **8 pages** including the following:
 - i. Description of mixed-methods study approach and methodology, including preliminary sampling strategy, data collection, data management and data analysis, gender equality and ethical standards
 - ii. Demonstrated experience in mixed methods and other qualifications outlined in this TOR
 - iii. A proposed timeframe detailing activities and schedule/work plan (including a Gantt chart)
 - iv. Team composition and level of effort of each proposed team member (if applicable)
3. A **financial proposal** with a detailed breakdown of costs for the study
 - i. Itemized consultancy fees/costs
 - ii. Itemized data collection expenses
 - iii. Itemized administrative expenses
 - iv. Validity period of quotations
 - v. Expected payment plan and method
4. CVs of all proposed team members outlining relevant experience (if applicable)
5. A copy of a previous report of similar work undertaken on: a) baseline study; OR b) endline study
6. Copy of legal registration (for registered firms)
7. A Consulting Firm profile (if applicable).

Submissions must be received by AKFC no later than **January 27, 2023** to AKFC.HR@akdn.org with a copy to Natasha.Asbury@akdn.org and 'IDEA Baseline Study Application' in the subject line.

Applications will be reviewed on an ongoing basis. *Only shortlisted candidates will be contacted.*

10. Evaluation Criteria

Proposals will be evaluated based on the following set of criteria:

Table 4: Proposal evaluation criteria

| CRITERIA | MAXIMUM SCORE |
|--|---------------|
| Technical Component | |
| Demonstrated experience in conducting and coordinating similar studies | 25 |
| Technical Experience of consultant(s) | 15 |
| Proposed Methodology and Approach | 30 |



| | |
|--|-----------|
| Gender Equality experience and proposed approach | 10 |
| Total Technical Component | 80 |
| Financial Component | |
| Realistic and appropriate costs for proposed work | 10 |
| All relevant costs included to carry out proposed work | 10 |
| Total Financial Component | 20 |
| | 100 |

AKFC is committed to advancing gender equality and inclusion through our programming and operations in Canada and overseas. AKFC requires all employees and consultants to review and abide by the [AKFC Gender Equality Policy](#).

AKFC welcomes and encourages submissions from people with disabilities. Accommodations are available on request for consultants taking part in all aspects of the process.

AKFC recognizes the importance of safeguarding and is committed to ensuring it manages a wide range of risks such that beneficiaries, staff, other associates, and the organization as a whole are kept safe from harm. All employees and consultants must respect the AKF Code of Conduct and [Safeguarding Policy](#).