

## ► Terms of Reference for partner organization to conduct field monitoring

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### [Estidama++ Terms of Reference for partner organization to conduct field monitoring]

#### [Background]

In Jordan, the majority of the workforce is in the informal economy, where there is increased risk of exploitation and a lack of social protection coverage. The exact number of informal workers in Jordan is difficult to measure, but based on previous labour force surveys, certain characteristics appear to increase the likelihood of workers being informal, marked by their lack of social security coverage. Workers in micro and small enterprises, non-nationals and workers in particular sectors such as construction and agriculture, all have lower rates of social security coverage. A combination of factors such as legal exclusion, contribution cost, awareness and employer compliance, influence participation. Without some form of social protection, workers face higher financial risks and consequences to their well-being when contingencies, such as sickness, unemployment and work injury, occur. The right to social protection is universal, and one in which Jordan has taken important steps to realize.

Estidama++ Fund – Extension of Coverage and Formalization project was initiated as a response to the COVID-19 crisis. This COVID-19 crisis funnelled into pre-existing decent work deficits, in particular those related to gaps in social protection coverage. Workers themselves realized the consequences of inadequate coverage as firms slowed operations and put workers into Furlow. The programme leveraged the increased attention to social protection during the pandemic as an opportunity to extend social security coverage to vulnerable informal workers, including refugees, while providing short-term income support to incentivize registration with the Jordanian Social Security Corporation (SSC) and to support compliance with contributions in the medium/long-term. The design and inception phase of the project started in June 2022 and will have a total duration of 18 months, the facility will focus on certain key priority sectors and typologies of workers. In Phase 2 (with prospective start up in May 2023) and other subsequent phases of the project, it is expected that the overall scope will be extended to additional sectors and types of workers.

The project is innovative in bringing together donor governments to help offset some of the financial barriers vulnerable workers experience in accessing social security, and to help offset the risk incurred by the SSC in extending benefits to groups who may be unable to pay full contributions in the short-term. In Phase I, the Kingdom of the Netherlands, the Kingdom of Norway and the Foreign Commonwealth and Development Office of the United Kingdom pledged their support. The SSC mobilized operational and technical teams to oversee the programme operations and integrate it into the SSC architecture (IT, Finance, Operations, Media etc.), with technical guidance and oversight from the ILO. One key area of ILO led support is in monitoring, evaluation, accountability, research and learning.

## [Programme Key Results]

The overall objective of Estidama++ is that national social protection systems achieve substantial coverage of female and male, Jordanian and non-Jordanian workers from vulnerable categories.

**This overall objective is to be achieved through the following specific objectives:**

- Short-term income support and contribution subsidy mechanisms are in place and accessible to previously uncovered male and female workers from vulnerable categories.
- Regulatory framework, systems and capacity for extension of Social Security Corporation coverage is strengthened to support the extension of coverage to vulnerable workers.
- Knowledge about sectors specificities, workforce composition, needs, perceptions and factors influencing willingness to join the social security system is enhanced.
- Vulnerable workers and employers have improved knowledge of social security and access to advisory services.
- Estidama++ reaches and mobilizes previously unreached, workers from vulnerable categories.
- Vulnerable male and female workers participate in sustainable social security system, for the long-term.

## [M&E of Estidama++]

Monitoring and Evaluation (M&E) is the process of collecting and analysing information to measure the effects of an intervention. M&E is conducted in reference to the theory of change and the chosen indicators. M&E should also seek to collect and analyse information more broadly on the effects of the intervention. This is done to assess if the intervention is causing any unforeseen or unintended consequences. A rigorous M&E framework has been put in place to support the management of the Estidama++ programme. Surveys of Estidama++ beneficiaries will be conducted to assess progress on key indicators and to support a broader learning agenda on the extension of social security to vulnerable groups. The SSC will provide information on programme results from its Management Information System. To provide additional data and confirm the situation on the ground, field monitoring will also be conducted.

## [Scope]

The ILO in coordination with the Estidama++ Technical and Operational Steering Committee is seeking the support of an institutional partner to conduct field monitoring of the Estidama++ programme. The objective is to provide independent monitoring of implementation and output delivery, and to capture quarterly representative sampling data for the programme results framework (see Annex A). The scope of work is expected to include a trialling of field monitoring tools, a quarterly telephone-based data collection for a representative sample, and focus group discussions to further elaborate the qualitative lines of enquiry. Throughout the partnership, the ILO will coordinate and agree with the partner on the data to be collected, how the data will be collected and how it will be analysed by the partner.

## [Methodology]

Field monitoring will be conducted for Estidama++ once each quarter and will consist of telephone interviews and in-person focus group discussions.

### *Telephone Interviews*

Enrolment for Estidama++ is conducted through the Social Security Corporation's database of businesses that employ vulnerable workers and by outreach to self-employed vulnerable workers and businesses that employ vulnerable workers. Some vulnerable workers are registered by their employers and some vulnerable workers self-register. The Social Security Corporation's database of Estidama++ participants can be used to form the sampling frame for the field monitoring. The sample for each quarter will be representative of the employment sector and the gender of programme participants. The employment sectors to be used are agricultural workers, construction workers and the self-employed. Data will also be disaggregated by income level, nationality and other key variables. The sample for each employment sector will be composed of at least 100 persons and split by 50 male and 50 female persons per employment sector. It is expected that participants will be selected randomly within each sector to fulfil the quotas described above.

Data collection will be conducted by telephone. The database to be used for data collection will be agreed between the contracted agency and the ILO. The data from the field monitoring will be made available to the ILO in an accessible format. Data collection will be conducted in Arabic.

### *Focus Group Discussions*

Telephone interviews will be complimented with in-depth focus group discussions. One focus group will be conducted with persons from each employment sector, i.e., agricultural workers, construction workers and self-employed. A total of three focus groups will be conducted per quarter. The composition of the focus-groups i.e. by gender, nationality etc. will be decided at the time of the focus groups. The focus groups will be conducted in-person and in a field location. The selection of the field location will be made by the Estidama++ managers in consultation with community members, local stakeholders and the contracted partner. A standardized interview schedule will be used for focus groups with some adjustments according to the composition of the group and information needs at the time. Detailed notes will be taken on the focus group. A short report on each focus group with key results will be made to the ILO.

It should be noted that the methodology described here may change according to the needs of the programme. Any changes will be agreed between the ILO and the contracted partner.

### **[Timeframe]**

The scope of work should be carried out from June 2023 to February 2025. It is expected that the field monitoring trial will take two weeks of work across a one-month period. The main exercise should then begin mid-June 2023 and continue until end 2024. The final report will be due within a month of the conclusion of the field monitoring data collection, in January 2025.

### **[Responsibilities of the partner]**

- Liaise with SSC and ILO to prepare for field monitoring
- Recruit an appropriate team, preferably with experience in social security and in conducting monitoring, to conduct field monitoring to support the implementation and learning from Estidama++
- Prepare the field monitoring data collection instruments in coordination and consultation with ILO and SSC
- Implement all the preparatory works including providing adequate training on data collection, and establishing a detailed implementation plan for each round of field monitoring

- Prepare all necessary logistical and transportation arrangements for the field monitoring and focus group discussions required by the partner
- Conduct telephone interviews with a selection of vulnerable workers and employers
- Ensure quality data collection, utilising new technologies where applicable. The data will be subsequently verified by ILO and SSC. If major inconsistencies or deviations are identified, the research agency will be required to re-interview at their own cost
- Conduct a simple analysis of the cleaned data, providing full documentation to SSC and ILO (see Annex A, draft programme results framework)
- Conduct focus group discussions with a selection of vulnerable workers from key sectors
- Prepare a short report on each focus group with key results for the ILO
- Prepare a simple field monitoring report and share with SSC and ILO for comments and inputs
- Be available to present the findings to SSC and ILO and partner organizations if requested.

### [Management]

The partner organization will report directly to the Estidama++ Technical Officer. The ILO will be responsible for decision-making and final clearance on the budget, research design, proposed fieldwork and draft reports. The role of the partner will be to provide expert technical advice on the research methodology and interpretation of the data, to conduct data collection in the field, undertake data entry/cleaning and analyses, and produce quarterly reports.

### [Budget and Payment]

The partner will receive payment for the total services rendered from ILO as per the agreed arrangement.

Payments will be made to the research agency in accordance with the following schedule:

- 1) 20% upfront, upon written request by the research agency, for advance payment (to fund full methodological inception plan, questionnaire development, finalisation, recruitment, training, pretesting, data collection, analysis and first report writing)
- 2) A second payment of 20% will be paid upon receipt of survey tools and data collection plan.
- 3) A third payment of 20% at interim data collection stages, upon receipt of an interim report.
- 4) 40% upon submission of the approved Final Report to ILO, at contract end.

### [Qualifications]

The research partner must offer the following demonstrated experience, knowledge and competencies:

- Good knowledge and experience of research concepts and approaches
- Good knowledge of the UN system, national programmes, principles of aid effectiveness, and awareness of the role of UN civil society partners at regional and national levels
- Sound understanding of the Human Rights Based Approach to development
- Experience in working on Social Protection
- Experience in the external monitoring of social protection programmes (e.g. spot checks, external verification, etc).
- Strong quantitative data collection and analysis skills
- Good analytical and communication skills

- Excellent writing and reporting skills

### How to Apply:

Experts wishing to apply to this assignment must send an email to Ms. Wedyan Abu Swilem ([abuswilem@ilo.org](mailto:abuswilem@ilo.org)), copying Ms. Chantal Sirisena ([sirisena@ilo.org](mailto:sirisena@ilo.org)).

### The email shall include:

- a. Company Profile
- b. A detailed financial offer, including cost per interview
- c. A full technical proposal, including evidence of previous experience with similar assignments
- d. Describe the availability of resources in terms of personnel and facilities required for the TOR.
- e. Provide (3) Clients references from United Nations organizations or similar IGOs, NGOs, or government or academic organizations

**Emails must use subject title: RFQ/2023/001\_Field Monitoring. The deadline for receiving applications is 25/05/2023 COB. Only applications that fulfill the requirements indicated above will be considered.**

## [Annex A – Programme Results Framework]

Results Statement	Indicators
Social security supports vulnerable workers to cope with life contingencies	% of Estidama++ participants who receive social security support during life contingencies <sup>i</sup>
Financial barriers to participation of vulnerable workers are reduced by subsidy	% of targeted vulnerable workers for whom the contribution <b>subsidy</b> is paid
Vulnerable workers are registered with Estidama++	% of targeted vulnerable workers who are registered with SSC
Registration of vulnerable workers is incentivised	% of targeted vulnerable workers who receive the coverage reward
Vulnerable workers and their employers are willing to participate in Estidama++	% of targeted vulnerable workers who are willing to pay for Social Protection
	% of employers of vulnerable workers who are willing to pay for Social Protection
Vulnerable workers and their employers trust Estidama++	Employers of vulnerable workers trust Estidama++ Yes/No
Improved knowledge of rights by vulnerable workers and their employers	% of targeted vulnerable workers who have accurate knowledge of their labour and SP rights
	Employers have accurate knowledge of their labour and SP requirements
Engagement with vulnerable workers and their employers on labour, SP, rights	% of targeted vulnerable workers who receive information on Estidama++/Rights
	% of employers who receive information on social insurance for their employees
Effective social security system for vulnerable workers is operational	% of vulnerable workers participating in Estidama++ who find the system to be easy to use
Grievance mechanism	# and % of grievances resolved
Assumption: The costs of participation in Estidama++ for employers are manageable.	
Assumption: That participation in Estidama++ will be manageable for the cash flow of employers.	
Assumption: Estidama++ will not have a negative effect on employment	
Assumption: Participation in Estidama++ will be affordable for vulnerable workers	