

Terms of Reference (ToR) for the project

Part 1

Assessment Instruments in National Examination

Colophon

These ToR have been prepared by:

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1 Introduction

On behalf of the Netherlands Ministry of Economic Affairs, the Ministry of Foreign Affairs and the Ministry of Housing, Spatial Planning and the Environment, the EVD implements respectively the G2G.NL programme (G2G), the Matra Pre-accession Projects Programme (MPAP) and the Environmental Facility of G2G.NL (G2G/V).

These Netherlands bilateral co-operation programmes aim to assist the two candidate member states, Croatia and Turkey, in meeting the criteria for EU membership through projects dealing with the (consequences of) implementation of European legislation. These programmes also assist the New Member States Bulgaria and Romania with further alignment and implementation of European legislation.

MPAP

Programme objectives:

1. to support the governments of Bulgaria, Croatia, Romania and Turkey with EU related issues;
2. to foster bilateral government to government co-operation.

The way in which the programmes are arranged in each recipient country is laid down in a policy document, the 'Memorandum of Understanding', which forms the legal basis for any activity to be undertaken.

Within the framework of the MPAP for 2007 the EVD identified the following project in Croatia:

Title	Construction of Assessment Instruments in National Examination
Budget	EUR 275,000 (including 0 % VAT)
Counterpart	The Croatian Ministry of Science, Education and Sports
Beneficiary	The Croatian National Centre for External Evaluation of Education
Duration	18 months

The EVD has formulated the Terms of Reference (ToR) for the project in accordance with the Logical Framework Methodology¹. During the drafting process information and feedback was obtained from the various Croatian parties involved and agreement on the content of the ToR was reached with the Croatian Ministry of Science, Education and Sports and the Croatian National Centre for External Evaluation of Education.

These ToR were formulated in full co-operation with the project's counterpart and beneficiary and represents all agreements made between the counterpart and beneficiary and the EVD regarding the framework of the technical assistance foreseen by the project (purpose, results, input of counterpart and beneficiary and required expertise).

The following chapters detail the project design and context, as well as the project organisation, as it was agreed upon with the Croatian counterpart and beneficiary. As such, this document serves as a basis for the proposal to be delivered by the tenderer according to the Tender Instructions for the project (*part 2*).

¹ In annex 1 of the Tender Instructions (*part 2*) the tenderer may find an information brochure on the Logical Framework Methodology.

2 Project context and design

2.1 Overall objective

The project aims to contribute to the accession of Croatia to the European Union.

In particular, the project aims to assist Croatia in implementing the external assessment system in Croatia, as defined by the legal regulations and strategic documents of the Government of Croatia, in accordance with European standards of competence.

EU relevance

The purpose of assessment in education is to provide insight into pupils' knowledge and skills, and to monitor the quality and the outcomes of education, using objective, reliable and valid instruments. External assessment aims to provide policy makers and the general public with information about the progress and improvement of the education system as a whole, against benchmarks established by the national curriculum and against other countries. The external assessment system also provides policy makers with evidence about the successfulness of education in order to meet with European standards and goals, as pursued in the framework of the Lisbon strategy.

2.2 Problem definition

Institutional setting

The Croatian Ministry of Science, Education and Sports is responsible for the policy regarding Education.

The Croatian National Centre for External Evaluation of Education (NCEEE) was established in March 2006, as part of the amended Secondary Act of July 2005. This Act regulated the introduction of National Exams², to be organised by the new NCEEE. The NCEEE has as its task to perform external and objective evaluation of student's performance and achievements. The Act also introduced standardised individual final exams for all secondary schools, known as the State Matura exams. The NCEEE is also responsible for the development of test material, strategy planning and organisation of Matura exams.

In the NCEEE, several departments would be involved in the project, namely the Department for Research and Development that has experts in statistics and psychometrics, the Department for Informatics which closely collaborates with the statisticians of the Department for Research and Development, and the Department for Quality Assurance, whose staff has experience working and preparing material with expert groups and is responsible for coordination and organization of projects related to the use of National exams results in school self-evaluation.

The development of testing materials is done by several Expert Groups (consisting of teachers and other experts). There are 21 expert groups associated with the NCEEE.

The Education and Teacher Training Agency (ETTA) has a role in setting pedagogical standards and has an advisory role for schools. ETTA provides education for teachers in the field of National Exams and National Matura and forms the primary communication channel to teachers.

² Terminology is different in Croatia: for external assessment ('periodieke peilingsonderzoeken'), as it is understood in The Netherlands, the term 'National Examination' is used. Matura refers to individual final exams (comparable to the Dutch 'central final exams').

Current situation

Croatia is currently in a process of educational reform. The Education Sector Development Plan 2005-2010, a strategic document adopted by the Croatian Government in June 2005, aims to direct the improvement of the educational system with a view to the accession to the European Union. The establishment of the NCEEE was part of this strategy.

The system for external evaluation was introduced in May 2006, with the first National Exam that was held in Croatia and organized by the NCEEE. Since, National Exams have been held in several primary and secondary schools (as of 14 years of age) and on different subjects, in the first half of 2007. At this moment, the NCEEE is trying to determine its strategy for the selection of focus groups and subjects, and sampling methodology, in order to establish and develop a continuous monitoring system for ensuring quality in education.

The Croatian NCEEE currently lacks the expert knowledge of the methods for test production and interpretation of results, which are necessary to gain insight into the state of affairs in the education system. The NCEEE has insufficient capacity and skills for the development of adequate tests and testing procedures. Furthermore, the NCEEE and the Ministry of Science, Education and Sports aim to develop a strategy for continuous improvements on the basis of the outcomes of assessments. Besides capacity building and training, this also means revising the strategy and focus of these National Exams (external assessments), applying current European insights in the education field. The Croatian government has requested assistance of The Netherlands for developing methods and a strategy for continuous evaluation and improvement of education, on the basis of Dutch good practices.

With regard to the storage and management of data, NCEEE is currently using a makeshift system, based on an SQL database (Microsoft software). Previously, NCEEE has been collecting data a.o. concerning students, school marks, socioeconomic background of students and results from National Exams for every student per item. NCEEE is now planning to develop a more modern system, that is more suited to the needs of large-scale National Exams. Expert advice with regard to this new database system, specifically with regard to the kind of data that are collected and how they could be used, will be part of this project.

The Croatian NCEEE has visited the Cito institute in an earlier visit to The Netherlands. Both the Croatian Ministry of Education, Science and Sports and the NCEEE have indicated that they are very interested in co-operating with the Cito institute, because of its valuable expertise in the field of educational assessment.

Proposed project intervention

The project aims to assist the education reform process in Croatia, by strengthening the capacity of the education sector to make continuous improvements.

The project will for one part consist of capacity building for NCEEE staff, that will be trained in the field of external education and assessment methods, i.e. psychometrics, test analysis and sampling methods. Also, members of expert groups will be trained in the field of assessment construction.

Furthermore, the project intervention will be geared towards the setting up of a strategy for the implementation of National Examinations, including recommendations for improvement. To ensure a good implementation in practice, one or two pilots with regard to specific grades and subjects will be part of the project intervention. This/these pilot(s) could, for example, focus on subjects such as Croatian language and/or mathematics.

Related initiatives (of other donors)

The World Bank supports the Croatian Ministry of Education, Science and Sports with the reform process of the education sector, through the Education Sector Development Project. This project is

relevant to the present MPAP project, as the WB hereby co-finances activities associated with the implementation of assessments. However, capacity building and policy / strategy development is not a subject of the World Bank project. This co-financing is expected to continue in 2008.

Cross/EVD supports a number of projects in Croatia. In 2006, two projects were developed entitled "Towards output oriented VET" and "Training Capacity building ESF". In 2007, two projects were set up, in the field of Quality Assurance in education, and on Educational Management.

Title	Towards output oriented VET
Contractor	AEQUOR
Counterpart(s)	The Croatian Ministry of Science, Education and Sports
Beneficiary(ies)	The Agency for Vocational Education and Training
Budget	EUR 200,000
Project duration	2007-2008
Project purpose	To reinforce the capacities of the Croatian VET- agency and local schools to better respond to the needs of the local/regional economy and follow good practices in VET, as an integrating element of the VET reform activities envisaged by the national educational reform documents and other supportive projects, i.e. CARDS, ETF and other bilateral programmes.

Title	Training Capacity building ESF
Contractor	CFI (responsible for ESF-funding for the ministry of Education, Culture and Science of the Netherlands)
Counterpart(s)	The Croatian Ministry of Science, Education and Sports
Beneficiary(ies)	The Agency for Vocational Education and Training
Budget	EUR 92,253
Project duration	2007-2008
Project purpose	Training officials of the Ministry of Science, Education and Sports and its agencies. The training also aims at professionalisation of the role of the Ministry of Science, Education and Sports as delegated implementing agency for the national Management Authority for IPA. This role requires skilled civil servants in the field of EU-administration and EU-project management.

Title	Monitoring School Quality in Croatia"
Contractor	The Inspectorate of Education in the Netherlands
Counterpart(s)	The Croatian Ministry of Science, Education and Sports
Beneficiary(ies)	Education and Teacher Training Agency
Budget	EUR 212,000
Project duration	2007-2008
Project purpose	The project aims to provide an introduction to a methodology for supervision and external evaluation of schools and to start the national dialogue about collaboration of stakeholders in order to build a national system for school quality assurance

Title	Educational Management
Contractor	Netherlands School for Educational Management, University of Amsterdam
Counterpart(s)	The Croatian Ministry of Science, Education and Sports
Beneficiary(ies)	Education and Teacher Training Agency
Budget	EUR 199,000
Project duration	2007-2008
Project purpose	Institutional capacity building in professional school leadership in Croatian primary and secondary schools

The current project is especially related to the above mentioned projects "Monitoring School Quality in Croatia" and "Educational Management", since the results from National exams are sent back to schools which are encouraged to use them for self-evaluation. This process would have an impact

on the quality of education and this experience could be shared with ETТА. In general, collaboration between the different stakeholders is important in light of the comprehensive system for school quality assurance which is being developed at this moment.

2.3 Project purpose

The purpose of the project is to strengthen the Croatian National Centre for External Evaluation of Education (NCEEE), to enable it to implement the external assessment system in Croatia, as defined by the legal regulations and strategic documents of the Government of Croatia, in accordance with European standards of competence.

2.4 Project results

The following project results are anticipated to be achieved:

1. Capacity of the NCEEE is strengthened with regard to methods, strategic and implementation aspects of National Exams (= periodical National Assessment);
2. Capacity of the expert groups is strengthened, to enable them to develop adequate test material for National Exams;
3. A future strategy is developed for the implementation of Exams, including recommendations for improvement.

2.5 Types of project activities and methodologies

The choice of types of project activities and methodologies is left to the tendering parties. Project results in projects carried out under the framework of the MPAP are generally achieved by the following type of activities (the list is non-exhaustive):

- analyses, such as SWOT-analysis, GAP-analysis, Force Field analysis, Training Needs Assessment, et cetera;
- plans, procedures and strategies, including documents detailing recommendations for the necessary changes;
- documents detailing the implementation of change processes, such as handbooks, manuals, communication plans, management plans, et cetera;
- study visit(s) to relevant institutions in The Netherlands;
- workshops, seminars and conferences;
- training etc.

In order to realise maximum sustainability and impact of the project results, it is advisable to use one or more of the following methodologies: task forces, working groups, counselling, hands on assistance, train-the-trainers and on-the-job training (non-exhaustive list).

Considering that most of the project activities are in support of activities to be implemented by the respective beneficiaries, the project's main contribution is to provide them with technical assistance, specifically in terms of project management and technical expertise.

2.6 Assumptions and preconditions

It is assumed that during project implementation there is a continued political commitment in both the EU and Croatia to European integration. As regards the transposition, implementation and enforcement of relevant *acquis communautaire*, it is assumed that possible changes at political level will not interfere with capacities built and organisational improvements achieved under the project.

It is assumed that all Croatian parties involved (ministerial bodies, politicians, NGO's, others) are willing to co-operate in the framework of the project, and will make available (human) resources in order to fully support the project's activities.

It is assumed that the government of Croatia will make available sufficient national resources in order to ensure the sustainability of the project's results.

It is a pre-condition for effective and efficient project implementation that incoming and outgoing missions and other activities are timely planned. This means that both the Dutch and the Croatian experts have to take into account the regular tasks of the Croatian parties involved and the project activities in which they are engaged.

A pre-condition for effective and efficient project implementation is that participants in training and dissemination activities have a good written and spoken command of the English language.

3 Project organisation

3.1 Input provided by the counterpart, beneficiary and contractor

Most activities formulated in these ToR are in support of activities to be implemented by the respective beneficiaries. The institution building nature of this project requires that the counterpart, in co-operation with the respective beneficiaries, assume full responsibility for the implementation of the activities to be supported by the project.

The detailing and/or fine tuning of the input mentioned below by the counterpart and the beneficiary (and if desired other stakeholders) will take place after the start of the project in close consultation between the contractor, the counterpart and the beneficiary. Detailing should be done according to actual circumstances.

Counterpart

The Croatian Ministry of Science, Education and Sports will secure the availability of sufficient manpower and expert inputs at counterpart level so as to ensure the successful execution of project *implementation activities* as well as the project *monitoring activities*.

Furthermore, the Croatian Ministry of Science, Education and Sports will secure coordination among relevant governmental and non-governmental stakeholders for a smooth implementation of the activities.

The Croatian Ministry of Science, Education and Sports will, where relevant and necessary, participate in project activities that bear relevance to the determination of future education policy and strategy in the field of National Examination.

The input of the Croatian Ministry of Science, Education and Sports was agreed upon by means of a Letter of Approval. This letter is attached to these ToR in annex I.

Beneficiary

The Croatian National Centre for External Evaluation of Education (NCEEE) will secure:

- the availability of sufficient manpower and expert inputs at beneficiary level so as to ensure the successful execution of project *implementation activities* as well as the project *monitoring activities*;
- adequate working space for the Netherlands experts carrying out the different activities under the project;
- support to the work of project experts otherwise (such as networking, involving beneficiary organisation, organising arrangements).

The counterpart/beneficiaries will ensure that participants of working visits to The Netherlands have a good written and spoken command of the English language.

The input of the Croatian National Centre for External Evaluation of Education (NCEEE) was agreed upon by means of a Letter of Approval. This letter is attached to these ToR in annex II.

Monitoring of the project

A Project Advisory Committee (PAC) will be established to guide and monitor the project.

The PAC should consist of officials who have the responsibility or the mandate to present the views of the Croatian counterpart and beneficiary(ies) and who can decide on issues which might influence the project.

Contractor

A (consortium of) Netherlands organisation(s) will be selected through a tendering procedure by the EVD and the responsible Netherlands ministry.

The contractor will be responsible for the implementation of the project. All Dutch institutional, legal and technical experts will in principle be deployed on a short-term basis. The short-term experts should have substantial experience in the relevant subject matter fields.

3.2 Nominated partner

The Netherlands Ministry of Education, Culture and Science is responsible for policy in the field of education assessment. The nominated partner has been involved in the specification of the project content and the project planning during the development phase of the project.

Participation of the Netherlands Ministry of Education, Culture and Science is strongly desirable, from the point of view of the MPAP programme goal of strengthening bilateral governmental relations. During the inception phase the contractor will consult appointed representatives of the aforementioned organisation in order to detail the mode and intensity of participation.

The nominated partner can be contacted during the tender phase.

3.3 Phasing and time schedule

The anticipated duration of the project is 18 months. Provided that the contract for the project will be signed before the end of 2007, the following timeframe will apply:

Project phase	Period
Start project	January 2008 (week 2)
Project inception period	January - March 2008
Project implementation period	April 2008 - March 2009
Project completion	April - June 2009

3.4 Budget

The maximum budget available for this project is EUR 275,000. The definite project sum will be determined by the EVD based on the outcome of the tender phase.

The maximum Daily Subsistence Allowance (DSA) for Croatia is:

- EUR 157 (Zagreb)
- EUR 207 (Dubrovnik)
- EUR 137 (Split)
- EUR 94 (elsewhere)

The exchange rate is 1 USD = EUR 0.70 (4e kwartaal 2007)

The following *indicative* budget breakdown in percentages can be used as a *reference*:

Inception phase	10% of budget
Project result 1	25% of budget
Project result 2	25% of budget
Project result 3	25% of budget
Completion phase	5% of budget

The project budget will account for:

- costs related to the reproduction of documentation for dissemination purposes;
- costs related to the reproduction of documentation for training(-of-trainers) purposes, and their translation into Croatian;
- costs related to interpretation at official meetings in Croatia (i.e. not on working level);
- transportation costs for the Dutch experts travelling from Zagreb to county or district locations for the planning and implementation of project activities.

In the framework of the Matra Pre-accession Projects Programme, material support may be part of project implementation under the condition that (1) the material assistance is an absolute pre-condition for realising one or more project results and, as such, achieving the project purpose; (2) the material assistance stays within an indicative maximum of 10% of the project budget.

For the participation of the nominated Netherlands project partner a indicative budget reservation of EUR 4.000 should be made. See also paragraph 3.2 above.

Annex I Letter of Approval from the counterpart

EVD
Unit International Public Co-operation
Attn. Ms Caroline van den Ende
P.O. Box 20105
2500 EC THE HAGUE
Fax: + 31 70 335 29 62

On behalf of the [name of the counterpart], counterpart in the project "[project title]" [(project number)], I herewith declare that the Terms of Reference have been realised in consultation with our organisation and experts and that our organisation agrees with the content of the documents as presented to us on [date of final ToR].

Furthermore, I declare that our organisation being the counterpart in the project will secure the availability of sufficient manpower and expert inputs at counterpart level so as to ensure the successful execution of project implementation activities as well as the project monitoring activities.

For monitoring purposes [name, function (directors level or higher)] will represent our organisation in the Project Advisory Committee.

[signature]

[name, position]

Annex II Letter of Approval from the beneficiary

EVD
Unit International Public Co-operation
Attn. Ms Caroline van den Ende
P.O. Box 20105
2500 EC THE HAGUE
Fax: + 31 70 335 29 62

On behalf of the [name of the beneficiary], beneficiary in the project "[project title]" [(project number)], I herewith declare that the Terms of Reference have been realised in consultation with our organisation and the counterpart [name of the counterpart], and that our organisation agrees with the content of the documents as presented to us on [date of final ToR].

Furthermore, I declare that our organisation being the beneficiary in the project will secure the following input:

- the availability of sufficient manpower and expert inputs at beneficiary level so as to ensure the successful execution of project implementation activities as well as the project monitoring activities;
- adequate working space for the Netherlands experts carrying out the different activities under the project;
- support to the work of project experts otherwise (such as networking, involving beneficiary organisation, organising arrangements);
- that participants of working visits to The Netherlands have a good written and spoken command of the English language;
- [other input agreed on in the ToR].

For monitoring purposes [name, function (directors level)] will represent our organisation in the Project Advisory Committee.

The detailing and fine tuning of the input mentioned above will take place after the start of the project in close consultation between the contractor and our organisation according to the actual circumstances.

[signature]

[name, position]