

## **Active Citizens Fund - Portugal**

### **Terms of Reference**

### **Pre-Defined Project “Citizenship Education”**

#### **Context**

The Active Citizens Fund (ACF) is implemented in Portugal within the framework of the “Memorandum of Understanding on the Implementation of the EEA Financial Mechanism 2014-2021” between Iceland, Liechtenstein, Norway (the Donor States) and Portugal, in force since 22 May 2017.

The Financial Mechanism Office, the programme operator of the Active Citizens Fund in Portugal, has selected the Calouste Gulbenkian Foundation as Fund Operator in Portugal, in consortium with the Bissaya Barreto Foundation. The Active Citizens Fund is operated in Portugal under the terms and conditions of the ‘Programme Implementation Agreement’ (PIA), signed on 9 July 2018.

One of the priority areas of ACF is the training of citizens for more active participation in public affairs, for greater respect for democratic values and for human rights, and for a culture of tolerance. All these values must be instilled as early as possible, i.e. from adolescence and youth, and therefore, schools have a decisive role in this transformation and awareness-raising process towards respect for difference and civic participation, in a framework of peace, freedom and equality.

In this context, the Calouste Gulbenkian Foundation and the Bissaya Barreto Foundation planned the implementation of a Pre-defined Project focused on Citizenship Education.

This Pre-defined Project (PdP) is attuned to the objectives and concerns of the Citizenship Education National Strategy, adopted in 2017 by the Portuguese Government, and aims not only to enrich it but above all to demonstrate the fundamental importance of the active involvement from Non-Governmental Organisations (NGOs) in this process, bringing in their experience and values, and in effect opening the school to the community. It is a complex project comprising a research component and an experimental component in three typified school clusters<sup>1</sup> and as a whole should become a good practice to be disseminated among the schools across the country.

The results of this Pre-defined Project should be disclosed to the Secretariat of State for Citizenship and Equality and to the Ministry of Education to mainstream it in the public policy and the Calouste Gulbenkian Foundation and Bissaya Barreto Foundation will actively back this process.

The promoter of this Pre-defined Project should be a NGO, selected through tender, together with a partner research center in charge of the research component.

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<sup>1</sup> In Portugal, the majority of the schools are organised in clusters (agrupamentos de escolas). Usually, each school cluster encompasses at least one primary school (1<sup>st</sup>-4<sup>th</sup> grade), one 6<sup>th</sup> – 9<sup>th</sup> grade school and one secondary (10<sup>th</sup>-12<sup>th</sup> grade) school from the same Municipality.

The selected NGO will be responsible for the overall project implementation, including the launch of the call to choose the three pilot initiatives at local level (experimental component), the coordination of all the activities to be implemented and its financial management.

### **Overall Objective**

- Achieve a systemic change in education and to strengthen the role of civil society organisations in influencing public policies and in achieving a more tolerant and engaged society.

### **Specific Objectives**

- Create a measuring instrument for the assessment of citizens' "level of citizenship" at the outset, in order to design tailored programmes to each group's needs and measure the progress later on;
- Promote the close cooperation between NGOs and schools, profiting from their expertise in different fields;
- Strengthen the role of NGOs in influencing the public policies.

### **"Citizenship Education"**

As the pre-defined project is totally aligned with the Citizenship Education National Strategy, we aim that the activities implemented in the framework of the Project relate to the goals of the "Citizenship and Development" (*Cidadania e Desenvolvimento*) curricular component with a particular focus on the following learning areas:

- Human Rights
- Gender Equality
- Interculturality
- Sustainable Development
- Environmental Education
- Media
- Democratic Institutions and Democratic Participation
- Volunteering

Moreover, the work in school clusters shall be totally aligned with the existing Citizenship Education School Strategies<sup>2</sup> reinforcing them.

Participatory, learning through action and innovative methodologies to engage and mobilise students must be at the core of the activities implemented in this pre-defined project. Furthermore, we considered that a whole school approach is essential to achieve success and to ensure the project sustainability. State of the art practices at the international level in this area should be followed.

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<sup>2</sup> In the Citizenship Education National Strategy it is foreseen that all schools develop and implement their own Citizenship Education School Strategy.

## Target Groups

7<sup>th</sup> grade – 9<sup>th</sup> grade (12-14 year old students)

## Project Structure

The selected Project Promoter and partner will be responsible for implementing the following key activities:

### Activity 1 – “Citizenship metric”

The research center will develop, test and implement a measuring instrument (metric) for the assessment of citizens' “level of citizenship” (skills) at the outset, in order not only to design programmes which are tailored to each group's weaknesses/needs, but also to measure progress later on, that is, the results achieved by the actions carried out vis-à-vis the situation before implementation. This tool may also have significant influence on the Government's public policy in this area and on the evaluation of its results.

In a first phase the research centre shall identify and analyse existing metrics at international level (e.g. Council of Europe's "Indicator Framework on Culture and Democracy", the International Civic and Citizenship Education Survey (ICCS), etc.) and prepare a questionnaire that is adequate to the Portuguese reality and easy to fill in by the students. The questionnaire shall enable the assessment at the outset of the interventions, in order to support the designing of action/training plans tailored to each group's weaknesses/needs, i.e. addressing the different areas of citizenship concerns and challenges in line with the target groups' profiles.

The research centre shall test the validity of this questionnaire in order to make the final adjustments and have it ready to be implemented in the three selected NGOs/school clusters associations, over the two following academic years.

The research centre will also be responsible, as partner of the promoter NGO, for implementing the questionnaire in the participating school clusters and for the analysis and reporting of results. The questionnaire shall be applied at the beginning and at the end of each school year (to the same students considered in the project) in order to allow the measurement of progress and impact of the citizenship education interventions. Each year a report with results shall be drafted and sent to the PdP promoter and to the Calouste Gulbenkian Foundation.

### Activity 2 – Citizenship education in schools

In order to promote close cooperation between schools and civil society organisations, the PdP promoter will open a call for the selection of three NGOs/school clusters associations in problematic areas (inside Lisbon and Porto Metropolitan Areas), in urban areas and in rural areas, of different regions of the country, as pilot/experimental initiatives. On the basis of concise terms of reference, the applicants will namely be asked to address the following:

- Diagnosis of the community, school(s) and target group;
- Identification and justification of the NGO(s)/school(s) association, namely previous work together;

- Outline of a 2-year strategy to improve the targeted students' level of citizenship education;
- Methodology to be used and division of tasks between NGO(s) and school(s);
- Role of the Citizenship metric to define the annual action plans and assess progress.

Each NGOs/school clusters associations can be formed by a consortium of NGOs with different areas of expertise (eg. human rights, environment, sustainability, democratic participation, etc.) that associate to a specific school to which, ideally, one or more of the NGOs have already collaborated with. The participation of a local NGO is mandatory.

The PdP promoter cannot be part of any of the NGOs/school clusters associations as it will have to ensure a strategic overview of the project, coordinating the different citizenship plans and guiding the pilot initiatives.

Before the Terms of Reference are published the PdP promoter shall discuss them with the Calouste Gulbenkian Foundation, which shall also participate in the selection committee choosing the NGOs/school clusters associations, in order to ensure transparency and respect for the project objectives.

After the selection, the NGOs/school clusters associations will implement, during two school years (2019/2020 – 2020/2021), citizenship education actions with the support of the promoter NGO. These actions will have to include theoretical and practical cross-disciplinary components that strengthen students' knowledge on citizenship areas so they become citizens who are committed, tolerant and in solidarity. The action plans shall include innovative intervention methodologies based on practical non formal education and on the application of the aforementioned metric. It is foreseen that these actions might involve around 300 students.

### **Activity 3 – Good practices manual and dissemination**

In the final phase of the Project, the PdP promoter will prepare a good practices manual that gathers not only the good practices of the work with NGOs/school clusters collected during the Project implementation but also the metric, main results and methodology used. The main goal of the good practices manual is to be a tool that can be used by other schools in Portugal to develop and improve their citizenship education activities.

This manual shall be presented in a final conference, and be broadly disseminated.

The PdP promoter shall be responsible for all tasks related to the financial control of the Project and the reporting to the Fund Operator.

### **Project Duration**

The Project will last 36 months.

Expected beginning date: 1<sup>st</sup> March 2019

Expected end date: 28<sup>th</sup> February 2022

### **Eligible Applicants**

The PdP promoter must be a Portuguese NGO, complying with Article 7 of the Programme Rules and be legally established and registered for more than two years when submitting the proposal. For the purposes of this tender, it shall set up a consortium with a research center, where the leading partner is the NGO.

Applicants shall demonstrate that they have experience and sufficient knowledge of civic education to develop and coordinate the project.

Applicants shall demonstrate they have sufficient administrative and financial capacity to implement the project and must have an organised accounting system.

Applicants shall abide by the principles of democratic values and human rights.

The PdP promoter is the entity which signs the grant contract with the Programme Managing Entity and bears all responsibility of implementing the project according to the contract and of achieving the set objectives and targets.

### **Role and Responsibilities of the selected NGO**

The selected NGO would be responsible for:

- closely following the development and implementation of the metric (activity 1);
- elaborating the terms of reference to select the three NGO/school clusters associations;
- monitoring the implementation of all school activities and ensure a strategic overview of the project, coordinating the different citizenship education plans and guiding the pilot initiatives (activity 2);
- developing the good practices manual and the project dissemination activities (activity 3);
- actively collaborate with the PdP evaluation process;
- paying all expenses related to the project;
- being the focal point of the relations with the Programme Management Unit and inter alia for submitting the progress and final reports.

### **Budget**

The budget cannot exceed 200 000 euros.

The overall budget proposed shall have as basis a detailed budget, with unit values by budget heading (budget template in the Programme's website).

### **Eligible expenditure**

Eligible costs are those actually incurred by the PdP promoter according to the criteria laid down in Article 17 of the Programme Rules, with exception of number 2 b) and i) and number 3 of the same article.

Indirect costs associated with the project are also considered eligible with a flat-rate of 10% of direct eligible personnel costs of the project.

The project budget shall include an allocation for an external audit to the PdP.

### **Submission of Proposals**

Interested NGO applicants shall submit a proposal including the following documents:

- Template with financial and legal data of the NGO;
- Description of the proposal including:
  - Motivation to present the proposal;
  - Presentation of the consortium and division of tasks between the partners;
  - Experience of the NGO in the area;
  - Experience of the research center responsible for developing and implementing the metric;
  - Detailed description of the NGO view on the PdP structure and explanation of the proposed methodology to implement the project;
  - Relevance of the proposal to the specific needs of citizenship education in Portugal;
  - Synergies with existing initiatives;
  - Particular added-value elements;
  - Expected results (quantitative);
  - Project's impact and sustainability;
  - Risk analysis and mitigation measures;
  - Communication and dissemination plan;
  - Proposed timeframe;
  - Organisational structure and the team proposed for the implementation of the action;
- Detailed budget (according to the template)
- NGO articles of association or statutes (last version);
- Constitutional documents/ Memorandum of association;
- Official registry of the NGO;
- Other relevant documents.

Proposals must be submitted via e-mail to [gulbenkian@cidadaos-ativos.pt](mailto:gulbenkian@cidadaos-ativos.pt) with the subject "Educação para a Cidadania – Proposta [Nome da ONG]", until the 14th of January 2019 12:00 GMT.

### **Evaluation Process and Criteria**

After being considered admissible, received proposals will be evaluated by a dedicated jury, composed by one representative of the Calouste Gulbenkian Foundation, one representative of the Bissaya Barreto Foundation and by one external expert to the two foundations.

The proposals will be evaluated according to the following criteria:

- demonstrated expertise on citizenship education of the applicant;
- ability of the applicant to network with other NGOs;



- experience and know-how of the research center identified in the application as responsible for the metric;
- experience of the applicant in administrative, logistical and financial management and ability to lead a complex and diversified project (in several geographical locations and different players);
- innovative approaches and proposed methodologies;
- proposed initiatives to increase project's impact, visibility and sustainability;
- proposed cost.

### **Contracting**

A grant contract will be signed by the selected NGO and sent to the PMU by registered mail with acknowledgment of receipt, within 20 days. This document needs to be signed by those responsible, under the law, for the entity.

### **Payment System**

The selected NGO will have to open a dedicated bank account which shall be used to receive all fund transfers and to pay all the expenses related to the PdP.

Once the grant contract is signed by the promoter and the partnership contract is received by the PMU, the approved grant is disbursed according to the payment system set in Articles 37 and 40 of the Programme Rules.

### **Reporting, Monitoring and Evaluation**

The selected NGO will have to submit the following reports:

- four-month progress reports at the end of March, July and December;
- a final report to be presented within 60 days after the final date of the Project.

Specific template reports will be developed by the Calouste Gulbenkian Foundation.

Following the submission of each progress report, a discussion between the Programme Management Unit and the PdP promoter will take place in order to assess the progress on the implementation of the project.

The pre-defined project will be subject to an external monitoring and evaluation. In this sense, and within the scope of a pre-defined bilateral cooperation initiative, the European Wergeland Center (EWC) (<http://www.theewc.org/>) will be responsible for these activities. EWC is a resource center on education for intercultural understanding, human rights and democratic citizenship. Its work builds on Council of Europe recommendations and policies and has as main aim to strengthen the capacity of individuals, educational institutions and educational systems to build and sustain a culture of democracy and human rights.

For all the expertise and work done and with the view of strengthening the relations between the Donor States entities and Portuguese NGOs, the pre-defined bilateral cooperation initiative with EWC is an added value and encompasses the following activities:

- Involvement, from the beginning of the Project, as critical friend and evaluator;

- Ongoing evaluation, visiting the project during its implementation (3 or 4 visits), exchanging information with the PdP promoter, giving feedback, suggestions and recommendations for improvement.
- Production of an external evaluation report on the project implementation, outputs and outcomes.

### **Communication requirements**

All the communication materials and results of the PdP must include the logos of Active Citizens Fund and of the Consortium (Calouste Gulbenkian Foundation and Bissaya Barreto Foundation).

### **Control Process**

Without prejudice to any other control mechanisms that may be adopted, the Pre-defined Project is subject to financial, physical and technical verification actions.

The control process complies with Article 47 of the Programme Rules.

After the conclusion of the PdP, all the documents shall be archived and available for auditing until 31st December 2028.

### **Irregularities**

If any irregularities are detected during verification actions or audits, Article 49 of the Programme Rules shall be applied.

### **Overall Timeframe**

**14<sup>th</sup> January 2018** - Deadline for Submission of proposals

**1<sup>st</sup> February 2019** - Selection decision

**1<sup>st</sup> March 2019** - Official Start of the Project

### **More information**

This Terms of Reference and other relevant information, including the Programme Rules, are available on the Programme's website: [activecitizensfund.pt](http://activecitizensfund.pt).

In case of doubt please send an e-mail to [gulbenkian@cidadaos-ativos.pt](mailto:gulbenkian@cidadaos-ativos.pt) until the 21<sup>st</sup> December 2018.



