TERMS OF REFERENCE
Research of Educational Programme – Lebanon
March 2020

Project Title: Strengthening the Capacities And Quality of the Lebanese Education System (SCALES)

Caritas Project No.: p190057

Project Period: 01.12.2019 – 31.08.2022

Fields of Activity: Humanitarian Aid / Education

Country: Lebanon

Accompanying Reference Documentation:
1. CACH & AAA organisational brief
2. The Quality Teaching and Learning Model (Information Sheet)

1. Background

1.1 Organisational Background
Caritas Switzerland (CACH) is active in response to the Syria Crisis with projects in Lebanon, Jordan and Syria addressing urgent humanitarian and non-humanitarian needs and building mid-term resilience-related capacities for affected populations. CACH’s response is in line with national response plans addressing members of refugee, IDPs’ and host communities alike based on needs. CACH’s engagement in the education sector in Lebanon addresses issues of quality and system strengthening, barriers for access, and focuses on refugee and host communities alike.

1.2 Project Background

a. Context
Since the outbreak of the Syrian war in 2011, approximately 1.5 million Syrians have sought refuge in Lebanon. Of all Lebanon’s public sectors, the education system is amongst those most heavily affected by the crisis. The system’s capability to cater for the education needs of more than 600,000 school aged Syrian refugee children and a growing number of vulnerable Lebanese children has been considerably overstrained. Although the international community and Lebanese government have taken joint initiatives to address the effects of the crisis and in particular to increase access of Syrian and vulnerable Lebanese children to education, challenges persist in many regards, and in particular in terms of quality of education and the system’s institutional capacities.

b. Programme
From 2016 to 2019, CACH supported Ana Aqra Association to implement the project “Improving quality of teaching and learning for vulnerable Lebanese and Syrian refugee children (QTL)” in cooperation with official Lebanese authorities and academia, with a focus on improving the quality of teaching and learning in the Lebanese education system.
The QTL model is composed of eight elements, each making an important contribution. All elements should be taken into account when implementing the QTL model and when teaching according to the QTL approach. All elements of the QTL model are intended to support teachers and educators in fostering child-centred teaching practices in the classroom in supporting improvement in children’s literacy and numeracy outcomes whilst supporting their psychosocial needs.

The project is entering a second phase in 2020 where CACH and AAA are seeking to further validate the effectiveness of the QTL model. A core component of the planned intervention “SCALES – Strengthening Capacities and Quality of the Lebanese Education Sector”, is the conduct of externally led research which will assess the effectiveness of the QTL approach in improving the quality of teaching and learning. Findings of research will be used to support consideration of further scaling and mainstreaming of the QTL model in Lebanon and beyond. The strategic objective of the SCALES project is “To improve the quality of teaching and learning for vulnerable host community and Syrian refugee learners in selected schools through support to the effective adoption and mainstreaming of the “Quality Teaching and Learning (QTL)” model across the Lebanese education system”.

2. Research Purpose and Audience

2.1 Purpose
The purpose of the proposed research is to establish the impact of the QTL model. Specifically, research should measure and present in detail the impact of the QTL model on teacher competencies, student learning and behaviour. Results of research conducted will contribute to activities seeking to achieve institutional uptake of the QTL model within the Lebanese education sector, specifically with the support of the Lebanese Ministry for Education and Higher Education (MEHE) as part of a comprehensive approach to addressing the goals of the Education 2030 agenda and targets set under SDG4 quality education. Research will focus on a selected sample of first shift public schools in the Lebanese formal education system, catering for grades 1-9, with specific interest on the ability of the QTL model to support matriculation rates for transitional grades 4 and 7.

2.2 Audience
Research will be conducted for use of the Lebanese Ministry of Education and Higher Education (MEHE), its Project Management Unit (PMU), and affiliated institutions: The Centre for Educational Research and Development (CERD) and The Department of Orientation and Guidance (DOPS), together with CACH and AAA and the Lebanese University’s Faculty of Pedagogy who together constitute the projects longstanding partners. Research findings may be utilised in support of project advocacy and communication with members outside the core partners listed above and for regional advocacy purposes.

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1 The Lebanese government took the unprecedented step of introducing a “second shift” of classes at 88 public schools for refugee children. There are now around 250,000 non-Lebanese children, most of whom are Syrian, enrolled in Lebanese public schools. The vast majority attend second-shift classes held in the afternoons, however, there are many schools with a large number of Syrian refugees enrolled in the first shift.

2 For further information on implementation of the QTL model by AAA in partnership with CACH, please see Annex 1. Previous implementation has focused on after school and remedial education within Lebanon’s second shift schools, within a combination of public and semi-private schools.
3. Research Objective
Research is intended to investigate the effect of QTL teacher training and support on teacher practice, and in turn student learning outcomes within Lebanese mainstream education.

Caritas Switzerland and project stakeholders are particularly interested to understand the impact/effect of QTL implementation on teacher performance, student performance and the school environment. The impact of the QTL coaching and training methodology on teachers’ performance should also be examined. It is expected that the research team would work with the stakeholders to further refine the research focus area and questions.

4. Research Design, Methodology and Parameters
The QTL model is a highly interdependent model with many variables that can affect students’ performance and wellbeing. Identifying the right questions and variables for research will be critical. A two-stage approach is envisaged in the research design, starting with a qualitative pilot study and followed by conduct of experimental/quasi-experimental research. The exact methodology for stage 1 and stage 2 is expected to be comprehensively developed in full by the research team in dialogue and close coordination with the QTL stakeholder group led by Caritas Switzerland. The following guidance is provided to support structuring of the research process.

Stage 1: Background / Desk Research
Conduct of comprehensive background research including reading and understanding of the QTL model, its previous implementation and data collected. This desk research component should comprise consideration of all related materials and information available from the core group of project partners, with specific focus on understanding the QTL model, its objectives and the nature of existing data demonstrating the model’s effectiveness. The background research should similarly entail consideration of secondary research into other relevant external and internal documentation, gathered with guidance from the project partners AAA and CACH. The first stage of research should result in sound understanding of the QTL model and the available data points on the model’s impact for students and teachers, as the basis for development of the stage 2 qualitative pilot study.

Stage 2: Qualitative Pilot Study
The second stage would entail a qualitative study envisaged as a shorter exercise designed to support development of the experimental/quasi-experimental research design used in stage 3. Stage 1 would include conduct of focus groups (with teachers, parents, educators etc.), classroom and other observations and key informant interviews in approximately three to four schools. These qualitative observations would be used to identify significant outcome areas for further investigation. Results of this stage 1 would be used to refine research questions, develop hypotheses for the quasi-experimental research design and inform focus for tools developed for use in stage 3.

Stage 3: Experimental-Quasi-Experimental Research
A third stage is envisaged to involve an impact assessment, designed as a quasi-experimental study. The study would involve gathering data from 15 intervention schools and 15 comparison schools (different from those engaged in stage 1), at two points: baseline and endline. The research team would be responsible for working with the stakeholders to design and finalise the sampling approach. All participant data must be anonymised. It is anticipated that the research team use cohort tracking methods.
4.1 Research Method

A mixed method approach utilising quantitative and qualitative data types is expected. The following tools, amongst others, are envisioned to be utilised to gather data relevant to pedagogical practice, students’ literacy and numeracy outcomes and the school environment:

- School data surveys (demographic, perception, performance, student learning etc.)
- Teacher questionnaires
- Student tripod surveys / pre-post assessments
- Formal classroom observations
- Focus group discussions with teachers and students
- Key informant interviews with different stakeholders

*Surveys will gather information on attendance and retention, teacher performance and student outcomes.

The different methods and tools for the experimental/quasi-experimental research should be applied to determine the base and endline data necessary for triangulated results. Research teams may wish to propose ways of strengthening their nominated research model i.e. through control variables such as the qualification levels of the teacher, average class sizes, socio-economic status, or school funding levels.

In addition to the qualitative research conducted in stage 1, focus groups, observations and interviews of a qualitative nature are expected to provide further information on teacher and student perspectives on the QTL programme including elements of coaching and training that contribute to teacher performance i.e. the importance of unified training across schools and the need for coordination between different QTL components. Qualitative data is intended to help in providing an explanation for changes seen in results of the stage 3 experimental/quasi-experimental research, as well as to provide insights into the factors important in pursuit of further adoption of the model, either to other schools in Lebanon or the region.

Key research parameters (Stage 2 and 3) are envisaged as follows:

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Stage 2. Level for Qualitative Pilot Study</th>
<th>Stage 3. Level for Experimental-Quasi-Experimental Research</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Number of Schools</td>
<td>Three to four schools</td>
<td>15 public schools in the treatment group and 15 schools in the comparison/control group</td>
</tr>
<tr>
<td>2 Subjects</td>
<td>Teachers, coaches and/or students (possibly parents and principals)</td>
<td>Teachers, coaches and/or students</td>
</tr>
<tr>
<td>3 Locations</td>
<td>(TBC) Geographical spread to be agreed with MEHE</td>
<td>(TBC) Geographical spread to be agreed with MEHE</td>
</tr>
<tr>
<td>4 Sampling Methodology</td>
<td>(TBC) Method for selecting schools and teachers/students to be agreed with MEHE</td>
<td>(TBC) Method for selecting schools and teachers/students to be agreed with MEHE</td>
</tr>
<tr>
<td>5 IRB required</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>6 Data Access</td>
<td>Anonymized participant data will be made available to the research teams, in line with</td>
<td>Anonymized participant data will be made available to the research teams,</td>
</tr>
</tbody>
</table>
Lebanese law and MEHE policies in line with Lebanese law and MEHE policies

<table>
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<tr>
<th></th>
<th>Timeframe</th>
<th>School Years</th>
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<tbody>
<tr>
<td>9</td>
<td>Academic year 2020-21</td>
<td>Focus on grades 4 &amp; 7</td>
<td></td>
</tr>
<tr>
<td>10</td>
<td>Academic year 2021-22</td>
<td>Focus on grades 4 &amp; 7</td>
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5. **Research Questions and Tasks**

Final determination and agreement on research questions will be expected of the research team in collaboration with project stakeholders. The following questions have been preliminarily determined as a guide for the conduct of research:

- What is the impact of QTL implementation on student’s performance? (Academic, behavioural & wellbeing/social and emotional learning elements)
- What is the impact of QTL implementation on teacher performance?
- What elements of QTL teacher coaching contribute to teacher performance levels?
- What elements of QTL teacher training have contributed to teacher performance levels?

The selected research team will be required to collaborate with programme stakeholders to ensure research is effectively designed, implemented, analyzed and documented. This includes (but is not limited to):

- Refining the proposed qualitative research questions (stage 1) to ensure that it lends itself to a feasible and rigorous research design, addressing key research questions and gaps.
- Developing the experimental-quasi-experimental research design and methodology, including developing an approach to sampling, developing, validating and piloting all tools and instruments.
- Overseeing all research data collection (including selecting, training and managing a local survey firm if preferred), including responsibility for quality control and incorporation of all ethical considerations.
- Liaison with CERD, Lebanon’s leading institution for educational research, including engaging in a participatory approach to finalisation of research methodology, design and tool development.
- All analysis and reporting, including designing the analysis approach; and
- Producing comprehensive final reports and collaborating with stakeholders to develop an approach to disseminating findings.

6. **Research Timeline and Deliverables**

The SCALES project is to be delivered between 2020-2023.

A final timeline of research activities will be decided between the selected research team and engaged stakeholders based on research particulars. However, timelines will reflect access to schools and teachers/students for data collection purposes (baseline and endline) as per the Lebanese academic year (beginning September to end of May).

The research timeline is mid 2020-2023. The research team is expected to be ready to start the assignment as of May 2020. The research timeline, inclusive of all research activities, should be proposed by the research team. Confirmation of the research timeline will be determined in conversation with CACH and AAA.
Engagement of the research team is envisaged to start with conduct of preparatory work, background research and design as early as May 2020. Results reporting for Stages 1 and 2 should be accompanied by workshops attended by key stakeholders and the research team as a means of communicating observations and results (i.e. likely two design workshops and two results reporting workshops). The final research report should be submitted 6 months before the project end date.

Key dates and information for development of research timeline include:

- Lebanese public school academic year: Year 1. September 2020 to May 2021
  Year 2. September 2020 to May 2021

Official public holidays in Lebanon will affect data collection activities in schools and the ability to research key educational personnel. These should be considered in development of a research plan and timeline of activities. Implementation of the QTL approach in selected schools is to take place across year 1 and 2 for research observation purposes.

### 6.1 Research Deliverables

The research team is expected to deliver the following products according to each stage. Final agreement on research deliverables will be subject to agreement between the research team, CACH and AAA and possibly subject to input also from core project partners.

**Stage 1. Background / Desktop Research**
- **Inception Report**
  Key findings from desktop research and consideration of existing data collected on the model. Outline of primary considerations to inform stages 2 and 3 of the research.
- **Research Plan**
  Covering stages 2 and 3.

**Stage 2. Qualitative Pilot Study**
- **Research Report**
  (10 pages plus annexes).
- **Draft Report**
  Outline of key findings and an indication on how these will inform the study design (20 pages plus annexes).
- **Final report**
  (20 pages plus annexes and including 3-5 case studies).

**Stage 3. Experimental-Quasi-Experimental Research**
- **Research Inception Report**
  (20-30 pages plus annexes).
- **Baseline Report**
  (20 pages plus annexes).
- **Midline Report**
  (40 pages plus annexes).
- **Endline Report**
  (40 pages plus annexes).
- **Final Synthesis Report**
  (60-80 pages plus annexes).

### 7. Ethical Standards and Quality
CACH will ensure that the research is designed and conducted to respect and protect the rights and welfare of people and the communities of which they are members, and ensure that the research is technically accurate, reliable, and legitimate, useful and conducted in a transparent and impartial manner, and contributes to organizational learning and accountability.

The study must ensure appropriate, safe, non-discriminatory participation of all participants, regardless of age, sex, or (dis)ability; a process of free and un-coerced consent and withdrawal; confidentiality and anonymity of participants.

All documents and data collected from interviews will be treated as confidential and used solely to facilitate analysis. Interviewees will not be quoted in the reports without their explicit permission. Both stages of the research will be subject to an Institutional Review Board for the research design. If the research team does not have an IRB, then the Lebanese University IRB will be used.

The research team will be required to sign and adhere to the following CACH policies:

- Anti-Bribery Policy
- Anti-Fraud Policy
- Whistleblowing policy
- Code of Conduct
- Child Protection Policy
- Anti-Terror policy
- Anti-modern-day slavery policy

8. Research Management

CACH are the contract commissioners and managers. Leadership of the research team will report to CACH and AAA regarding ongoing project management and the conduct of research, with close cooperation with CERD for development of the research design and methodology. A research consultative group will also be established with a nominated member from each major stakeholder to ensure coordination of stakeholders, to harmonize engagement with the research team and to provide gatekeepers enabling access by the research team to the different stakeholder organizations. This group will meet with the research leader/team at key stages during the project. Access to stakeholders, including schools (students and educational staff) will be facilitated through direct approvals/agreement with the Lebanese MEHE.

9. Research Team Composition & Desired Qualifications

Research teams can be composed as determined suitable to achieve the stated outcomes of research. Roles and responsibilities of personnel enlisted to conduct the research should be clearly identified in the proposal. Expected and desirable qualifications are outlined below:

**Expected:**

- **Research Team Lead:**
  - Technical expertise in educational research (5+ years professional research experience).
  - Experience in the conduct of impact research, including qualitative and quantitative research design, methodology and analysis.
- PhD holder (minimum academic requirement).
- Demonstrated experience leading larger scale research projects including management of a research team.

**Research Team:**
- Master (minimum academic requirement)
- Experience in conduct of qualitative and quantitative research and data analysis and research tool development

**Desirable (Across Research Team):**
- Experience working with international NGOs or UN agencies.
- Arabic language skills.
- Knowledge/experience of the MENA regional and/or Lebanese context.
- Experience working with national public institutions, including government ministries.
- Experience working in the humanitarian or development fields.

**10. Application Process**

Interested research teams will be expected to submit a research proposal which includes:

- **Technical Proposal** (up to 5 pages) - indicative covering description of approach to stages 1-3, including:
  - research design,
  - research timeline,
  - proposed research methodology, justification for selected method, proposed sampling strategy,
  - clear activity outline,
  - statement on how ethics and child protection will be ensured in data collection process and visits
  - overview of data management processes i.e. data cleaning methods, and
  - statement of benefits and risks of selected research methodology and risk mitigation measures

  (Final technical proposal for conduct of research will be determined in collaboration with selected research team).

- **Financial Proposal** – including outline of expected costs including personnel, travel, and associated research expenses.
- **Description of previous related work conducted in the education/humanitarian sector, for example organizations previously worked for/with and related projects.**
- **CVs of team lead (required) and other research team personnel**
- **Sample research report/product (preferably of a similar research output – published works preferred).**

The proposal should be submitted by 10\textsuperscript{th} of April 2020 through the online portal. Caritas Switzerland may store all submitted documents for potential future consultancy opportunities unless instructed otherwise.

Please submit any questions/queries during the application process to lheyworth@caritas.ch.
Annex 1 – Caritas Switzerland & Ana Aqra Association

Caritas Switzerland

Caritas Switzerland (CACH) established its Syria Crisis Response Office, based in Beirut, Lebanon, in 2016. The Office coordinates and implements activities with partners across the Education, Livelihoods and Humanitarian Assistance sectors, serving both Syrian refugee and host communities in Syria, Jordan and Lebanon.

CACH’s education work in the MENA region seeks to promote inclusion and provide lasting learning opportunities for marginalised children and young people. The focus of its interventions has been on support to remedial education, psychosocial support and child protection. In Lebanon, CACH has worked to address the needs of local host community and Syrian refugee children through partnerships with national and local NGOs delivering remedial education programmes and by working with partners on initiatives designed to enhance the quality of education in the country. A key component of CACH’s education strategy in the country has been engagement in and support for the national system, through capacity building and the provision of technical expertise and strategic support through the canvassing of best practice methodologies and facilitating exchange of national and international expertise.

Ana Aqra Association

Ana Aqra Association (AAA) has been working with pre-primary and primary public schools and underprivileged children in Lebanon since 1998. The organisation contributes to sustainable investments in support of young learners specifically to; build the capacity of the public school teachers and teaching staff, provide teachers and students with opportunities to succeed, and to equip classrooms with the necessary tools for learning. AAA’s approach to teaching and learning is learning centred (student and teacher) and designed to maximize teachers’ ability to reflect on their practice and support students to become independent lifelong learners.

AAA’s current activities in Lebanon are centred on development projects within Lebanese public schools, but also include implementing non-formal education programs. AAA has programmes aimed at basic schooling age and also early childhood education. AAA’s Retention Support Approach was adapted by the Lebanese Ministry of Education and Higher Education (MEHE) as a means to harmonise retention support programs provided by local and international organizations in Lebanese public schools serving Syrian refugee and host community students. AAA has also contributed via relevant committees in the development of curricula for Community Based Early Childhood Education. In partnership with World Learning, AAA is a partner in implementing the QTIABI project (Quality Instruction towards Access and Basic Education Improvement), specifically AAA will be contributing to the project in Arabic language classes, as a part of the project’s overall goal to expand equitable access and improve learning outcomes for vulnerable students.

AAA, funded by CACH, worked together with collaborating education institutions in Lebanon to implement the Quality Teaching and Learning model and project (see annex 2). QTL leveraged AAA’s thought leadership in establishing inclusive save and enabling learning environments developed over years of implementation, and included key components focussed on enhancement to teaching and learning practice, while advocating for complementarity between pre-service and in-service teacher education, teacher coaching and classroom practice.
Annex 2 – Quality of Teaching and Learning

QTL Project Implementation 2016-2020

In partnership with the Ministry of Education and Higher Education (MEHE), Centre for Educational Research and Development (CERD), and the Lebanese University (LU), CACH and AAA began in 2016 working on the development and implementation of the QTL model. QTL was first developed to address comprehensively needs within education in emergencies contexts but evolved throughout the four year project implementation in recognition of its relevance to improving performance of teachers and students also within longer-term educational responses. The QTL model supports young people to become independent learners and to improve their literacy and learning skills.

CACH and AAA will enter a next phase of the QTL project in 2020 which seeks to further demonstrate the effectiveness of the QTL model and look to scale it’s implementation. The planned intervention, SCALES Strengthening Capacities and Quality of the Lebanese Education Sector is intended to run from 2019 till 2022/23. Linking with the objectives of the SDG Education 2030 agenda, and specifically SDG4 Quality Education, the SCALES project will seek to support achievement of meaningful improvement in quality education, addressing a renewed focus on equity, inclusion and effective learning. SCALES is also concretely in line with Lebanon’s education strategy, Reaching All Children with Education (RACE) II, namely pillar 2 (improving quality) and pillar 3 (system strengthening). This second phase will continue a focus on improving the quality of teaching and learning for vulnerable host community and Syrian refugee learners, but also entails support to the effective adoption and mainstreaming of the QTL model across the Lebanese education system. To achieve this, SCALES will incorporate four components: externally led research into the effectiveness of the QTL model, a strategy to bring QTL to a larger scale and mainstream the model within the Lebanese education system, active implementation and use of the QTL model as a part of mandated and core activities of key Lebanese education institutions, and continued efforts to deliver improved quality of teaching and learning for vulnerable host community and Syrian refugee children.

The QTL Model

The Quality Teaching and Learning model is composed of eight elements, each making an important contribution to the model. All elements should be taken into account when implementing the QTL model and when teaching according to the QTL approach. The elements support creation of child-centred teaching practices at the classroom level, including a focus on measurable improvement of literacy and numeracy outcomes and better support for children’s psychosocial needs.
Implementation of the QTL model also includes four core components:

1. **The workshop structure for teaching and learning.**
   This teaching and learning structure builds on the Gradual Release of Responsibility (GRR) Framework that reinforces a gradual shift of responsibility within the classroom from teacher to students. The workshop structure and GRR are built upon a sound research base and are both adapted to fit the context(s) where AAA has implemented its programs in formal and non-formal education. The workshop structure enhances classroom management so that teachers can spend more time on learning instead of fixing behaviours. The workshop structure also reinforces a focus on student practice and reflection while allowing for the scaffolding of learning and differentiated approaches which enable teachers to better respond to the multiple levels and needs of students in the same classroom.

2. **Psychosocial Support (PSS) for students.**
   PSS is integrated into the educational program as support to learners in times of crisis. PSS is a critical element in supporting the overall learning environment. It enables teachers to implement social and emotional activities into their curriculum, and to empower children to participate independently in activities that match their needs while supporting their social, emotional and cognitive growth. The integrated PSS program importantly incorporates a focus on parental engagement, highlighting the essential role that parents play in their child’s learning process, and thus in the successful implementation of the QTL model.

3. **Specific teacher training.**
   This teacher training is central to the QTL model. The aim of the QTL teacher training is to strengthen the knowledge and skills of all participants in teaching and learning and to establish metacognitive strategies that support students’ learning across the curriculum. QTL teacher training focuses on the importance of differentiated approaches in a multi-level classroom. It emphasizes the importance of observing and assessing students’ learning within a positive and safe environment where errors are expected and there is recognition of the value of risk-taking in the learning process.
Coaching teachers is an important accompaniment to teacher training. Reflective coaching supports teachers’ professional development and enhances their sense of achievement. The coaching process is designed and organized to improve both teaching and learning outcomes. While expert coaches provide appropriate support for the teachers, they maintain the conditions and circumstances to support the intellectual, scientific, psychological, emotional and social growth of both teachers and students thus improving the entire school climate and community. QTL coaches provide important support including the modelling of practice for teachers in real classroom environments and giving constructive, supportive and considerate feedback. The coaching approach is collegial and empowers the reflective practice of teachers.3

The QTL Handbook
A key development of QTL project implementation was codification of the QTL approach encompassing technical and pedagogical components of teaching and learning methodology, training and coaching; and the collaboration model between stakeholders in the education sector including NGO, ministry, and academic institutions. The output of this codification has been the collaborative development and production of a “QTL Handbook” that has been endorsed by the Ministry of Education and Higher Education.

The holistic approach to teaching advocated by the QTL model, that aims to not only support academic performance improvement, but also address the psycho-social support needs of students, also takes on a systems approach to improvement in the quality of education. This is visualised in the diagram below.

3 QTL narrative taken from the soon to be published QTL Handbook