



A. S. Hornby Educational Trust

## Evaluation of the impact of programmes

### Terms of Reference

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#### 1. Call for proposals from consultants.

The AS Hornby Education Trust wishes to appoint consultant(s) to undertake an evaluation of the impact of its various programmes and activities (called the 'Study'). This document sets out the Terms of Reference for the study, together with some background information.

Note: the deadline for submission of Expressions of Interest is 10 February 2025 and that for submitting a proposal is 25 March 2025 @ 2359 (GMT) (see Sections 10 & 11).

#### 2. Background

The A.S.Hornby Educational Trust CIO ([www.hornby-trust.org.uk](http://www.hornby-trust.org.uk)) (ASHET) supports the teaching and learning of English as a foreign language internationally, especially through providing grants and scholarships. ASHET prioritises capacity building of English language teaching professionals in low- and middle-income countries. The Trust has been engaged internationally in these activities for over 60 years. Current annual expenditure is approximately £700K.

The Trust's main annual expenditures are for the Hornby Scholarship programme. There are also several more modest programmes and schemes through which ASHET also furthers its charitable aim. These are mentioned below.

#### 3. The purpose and scope of the study

The purposes of the study (in priority order) are:

- To advise trustees on the relative impacts of the portfolio of ASHET programmes; this to feed into strategic decisions about the shape of the portfolio of programmes, and to increase the effectiveness, efficiency and impact of existing programmes and projects.
- To evidence to the UK and global ELT professional community, successes of ASHET global activities.
- To evidence to our beneficiaries (alumni, grant holders and other participants) the successes of ASHET towards delivering locally appropriate and sensitively delivered solutions.

The Trustees require the study to be critical, identifying successes and failures, to include feedback from partners and beneficiaries and to make suggestions for enhancing impact.

This is the first comprehensive impact study that ASHET has undertaken, although the activities of ASHET date back over 60 years. Additionally, our detailed records are somewhat patchy, so we plan this study to be in two phases:

- i. Phase 1: A study to assess what appropriate data might be available to assess the impact of activities and identify any gaps. Also to initiate tracer studies, report on findings and make recommendations for the more detailed studies in Phase 2.
- ii. Phase 2: To follow up on the recommendations of Phase 1, as appropriate.

ASHET also proposes that this study should, in the main, cover the last 10 years of most activities. Although for some programmes, notably the Hornby Scholarships programme, more information will exist over a much longer term eg from alumni. In such cases we expect the consultants to consider these within this impact study.

Note: The proposal to be submitted at this time is only for Phase 1 (Section 9 below). While ASHET anticipates that the same consultants will be retained to deliver Phase 2, the full scope of Phase 2 will only be decided after reviewing the findings from Phase 1.

## 4. Activities funded by ASHET

The variety of activities funded by ASHET over recent years are listed below. While the Scholarships' programme costs approximately £350k per annum, all the other schemes listed below involve smaller grants of between £100 and £15k.

For the Phase 1 study the consultants are expected to consider the specific activities below.

- Master's degree scholarship programme (4.1 below)
- Alumni projects support (4.2 below)
- Teacher Association Projects (4.3 below)
- Regional workshops (4.4 below)
- Learner-oriented Lexicographical and Dictionary Research Projects (4.5 below)

### 4.1 Master's Degree Scholarships programme

The Hornby Scholarship programme has always been significantly the highest cost activity of ASHET. It fully funds select high-performing individuals, who are active and experienced English language teaching professionals, to develop further their skills and knowledge through following one year Master's degrees in TESOL in UK universities. All scholars are rigorously selected. They must be citizens of the predominantly low- and middle-income countries on the DAC List<sup>1</sup>.

It is an important principle of the Hornby Scholarship Programme that scholarships are provided primarily to scholars to enhance their abilities to deliver real impact for the development of English language teaching in their home countries. The selection process for the scholars is rigorous and seeks to identify those individuals who will make a systemic difference.

The Scholarship programme was managed by the British Council up until academic year 2022-23. Following the withdrawal of the British Council from the scheme, in 2023 ASHET organised a competitive tender for delivering the scholarships, and the University of Exeter was appointed to deliver the programme for the next academic 3 years – for both academic and

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<sup>1</sup><https://www.oecd.org/dac/financing-sustainable-development/development-finance-standards/DAC-List-of-ODA-Recipients-for-reporting-2022-23-flows.pdf>

management requirements. There are currently 11 scholars following the Master's degree programme at Exeter (10 recruited internationally plus one refugee scholar from the UK)

## 4.2 Alumni support and network development

After completing their Master degree studies, many Hornby alumni move on to hold senior professional positions within their own or other countries. The Trust attaches great importance to fostering the continuing development of this professional network and, wherever appropriate and feasible, supporting contributions by alumni to current and planned Trust activities.

The following describes various funding approaches through which alumni have been supported. These are provided to illustrate the variety of activities as the priority need is to review the impact of Alumni Project Grants component.

### i. Alumni project grants

For several years, the Trust has encouraged alumni to apply for grants for the implementation of small-scale, localised projects designed to support any aspect of effective English language teaching in their home contexts. 12 projects were funded in 2022-23.

All projects are required to submit final reports. These are evaluated by ASHET trustees. The two alumni whose project reports are judged to be most relevant to ASHET aims are invited to make a presentation of their project at the annual conference of the International Association for the Teaching of English (IATEFL).

### ii. Alumni annual participation in IATEFL conference

The Trust attaches importance to supporting the participation of Hornby alumni in each year's IATEFL Conference.

### iii. Alumni ELT Journal articles mentoring scheme.

This scheme provides mentoring support for Hornby alumni seeking to prepare and submit articles for inclusion in the ELT Journal and other professional ELT journals.

### iv. Alumni network development

A key Trust objective has been to seek effective ways to mobilise and benefit from the collective experience of the more than 460 ELT professionals who have been Hornby Scholars. This is a new initiative to promote professional sharing and networking.

## 4.3 Teacher Association Projects

The ASHET Teacher Association Project Award Scheme supports ELT Teacher Associations working in public education systems in low- and middle-income countries to engage in small-scale projects relevant to their local contexts. The information provided to potential applicants introduces basic ideas underpinning the ASHET Decentring initiative. It suggests that applicants consider these when planning and providing a rationale for their projects. The scheme has expanded over the last few years both in the number of awards (3 projects funded in 2018/19 and 10 in 2022-23), and in the size of awards offered (maximum funding increased from £2,000 to £4000 in 2023-24).

All projects are required to submit final reports and these are evaluated by ASHET trustees. A representative from each of the two Teacher Associations, whose projects are judged most relevant to ASHET aims, is invited to make a presentation of their project at IATEFL.

Links to several project reports are provided on the ASHET website.

#### 4.4 Regional Workshops

In previous years ASHET has funded up to three Regional Workshops per annum (in Africa, Latin America and SE Asia) to enable ELT professionals, from countries in the selected geographic regions, to come together for professional development and networking. The British Council organised the workshops and contributed to the costs (as did local partner institutions). In recent years, the workshops have been targeted at leaders of Teacher Associations, to support them in reaching and meeting the needs of members. The programme was suspended on the outbreak of the Covid pandemic, and its future is currently under review.

More details of past Regional Workshops are given on the ASHET website.

#### 4.5 Learner-oriented Lexicographical and Dictionary Research Projects

The Trust's Founder, A.S. Hornby, was a pioneer in broadening the professional focus of the discipline of lexicography, from a largely academic emphasis on philology and linguistics, towards a practical emphasis on the educational utility of dictionaries to learners of a language. The Trust honours and seeks to reinforce his ground-breaking legacy through the ASHDRA (A.S Hornby Dictionary Research) initiative.

Each year, the ASHDRA scheme awards a grants to support research projects focused on learner- and learning-centred lexicography. ASHDRA grants are awarded based on an open, international competition, with submissions assessed and, where successful, subsequently monitored by a specialist panel.

### 5. Supporting the evaluation: evidence gathering and analysis

ASHET will make its data and reports available to the consultants. Trustees will also assist directly through advising on key organisations and individuals from whom to seek evidence.

#### 5.1 Documents and other secondary data

The availability of data and reports covering ASHET projects and activities is somewhat mixed. ASHET has a collection of the more recent activities and related reports. Some in-country teacher associations might have retained documents, as these associations typically involve alumni. UK university staff might also have been involved and could have retained extra details.

ASHET maintains a database covering some alumni from the Scholarship's programme who have followed Master's programmes in the UK, over the last 60 years. To date there have been some 460 alumni.

Some information and reports were collected by the British Council during their period of in-country management of activities and, where these exist, they would be made available.

#### 5.2 Key informants

Over the recent decade a mix of organisations and individuals have been involved in participating in, and delivering projects, these include:

- Alumni from the ASHET scholarship's programme
- ASHET Trustees (past and present)
- In-country representatives of teacher associations and managers of teacher workshops and regional workshops
- Other recipients of grants for activities
- British Council and other partner organisations

These would normally be available for interviewing and/or conducting surveys.

ASHET trustees and staff would be available to assist the consultants to identify the relevant individuals and provide contact details.

## 6. Outputs

As was explained above, ASHET intends that the overall study should be delivered in two phases. The detailed nature of the second phase depending on the findings from the first.

### Phase 1: The Initial Study

#### i. Inception Report

After approximately four weeks from commencing the study, the consultants should provide an Inception Report for ASHET. This should be a very brief synopsis of initial progress (two to four A4 pages), it should identify any challenges encountered and set out activities to be covered for the rest of Phase 1. It would also provide a useful means for the consultants to flag up concerns and engage directly with Trustees.

#### ii. Phase 1 Report

At the end of Phase 1 the consultants will provide a Phase 1 Report to ASHET Trustees. This report would be finalised after a workshop, led by the consultants, to present draft findings and recommendations to the Trustees and obtain their feedback.

During Phase 1 the consultants should address the following in relation to considering the impact of ASHET programmes and the priority activities provided in Section 4 above:

- i. Assess which data sources exist and their relative appropriateness for assessing impact.
- ii. Consider the best approaches for the gathering of data from each.
- iii. Identify any gaps in these data that might need to be addressed to assess impact effectively.
- iv. Undertake a pilot tracer study for alumni from the UK Master's degree programmes that might inform the approach for more detailed research for Phase 2.
- v. Undertake pilot studies for a selection of other activities that might inform the approach for more detailed research and review in Phase 2.
- vi. Provide a Phase 1 report that details findings to date and includes recommendations for Phase 2.

## 7. The Budget

ASHET has allocated a budget of up to £15,000 (plus VAT) for the Phase 1 study. The budget for Phase 2 will be up to £15,000 (plus VAT). The final amount for the latter will be agreed after completion of Phase 1 and identification of priority activities for Phase 2.

The fee for Phase 1 of the consultancy will be provided in three instalments, the first (30%) on mobilisation, a second (20%) on delivery of the Inception Report and the third (50%) on completion of Phase 1.

While it is envisaged that the same consultants might undertake both Phases 1 and 2, ASHET reserves the right to make any changes that might prove necessary.

## 8. The Phase 1 Proposal

The proposal required from the consultants should just be for Phase 1.

There is no need to make any submission relating to Phase 2 at this stage as the Terms of Reference and fee for Phase 2 will be developed after completion of Phase 1.

The proposal should be comprised of two components:

- A. A technical proposal that clearly sets out:
- i. The proposed overall approach, the methodology and evaluation activities proposed to be undertaken.
  - ii. Management and delivery plan, with reporting arrangements and time-lines, necessary to deliver the study in a quality and timely way.
  - iii. Details of the individual consultants to be employed on the project, and their brief CVs to indicate relevant previous experience (800 words maximum)
- B. A financial proposal that sets out the total fee for Phase 1 of the study. This should include the days of consultancy time allocated and any additional requirements.

Note: ASHET does not envisage international travel for this study, although UK travel will be reimbursed at cost.

## 9. Time scale for proposal submission and project delivery

DATE	ACTION
14 January 2025	Call for proposals published
10 February 2025 @ 2359 (GMT)	Deadline for Consultants to submit Expression of Interest.
17 February 2025 @ 2359 (GMT)	Deadline for submission of clarification questions
21 February 2025	Responses to clarifications questions shared
<b>25 March 2025 @ 2359 (GMT)</b>	<b>Deadline for submission of proposals to ASHET</b>
4 April 2025	ASHET informs the preferred consultant
18 April 2025	ASHET finalises contract with the preferred consultant
26 May 2025	Inception report to ASHET
9 July 2025	Phase 1: Presentation of Draft Report. Consultants run workshop with ASHET Trustees (date to be agreed)

- ASHET trustees will develop the requirements for Phase 2 only after receiving the Phase 1 report.

## 10. Expressions of Interest

All consultants interested in delivering this project should send a very brief Expression of Interest (EOI) to: Aida Kowalska : [aida.kowalska@hornby-trust.org.uk](mailto:aida.kowalska@hornby-trust.org.uk)

by 10 February 2025 @ 2359 (GMT). Please provide the name, email contact and phone numbers for the key person(s) to be involved. Receipt of all EOIs will be confirmed.

### Clarifications and queries

Institutions should submit any queries and questions for clarification by 17 February 2025 @ 2359 (GMT). Please send to:

Aida Kowalska: [aida.kowalska@hornby-trust.org.uk](mailto:aida.kowalska@hornby-trust.org.uk)

## 11. Assessment criteria

The following criteria will be employed for assessing all proposals against the Terms of reference set out above:

<b>ASSESSMENT CRITERIA</b>
Proposed approach to the study and methodology to be employed
Proposed management delivery and reporting for the study
Evidenced relevant experience of the consultants to be involved
Financial proposal

## 12. Confidentiality, Data Protection and Professional Indemnity

The contract to be agreed with the consultants will clearly set out requirements relating to security and confidentiality of information, conformity to Data Protection legislation and Intellectual Property Rights.

Consultants are required to have appropriate levels of professional indemnity insurance in place.