

**Roma Education Fund
(Budapest – Hungary)**

Invitation to bid for research project

Research Specification

The Roma Education Fund wishes to invite tenders for a research project which will be carried out by the successful tenderer(s) in Romania. The specific focus of the research will be on teacher absenteeism and its impact on Roma children in primary school education.

Deadline for Submissions: 30th September 2010

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TERMS OF REFERENCE

1. Statement of Interest by the Commissioning Authority

1.1 In July 2003, the first high-level regional conference on Roma: "Roma in an Expanding Europe: Challenges for the Future" was held in Budapest. Participating countries were Bulgaria, Croatia, Czech Republic, Hungary, Macedonia, Romania, Serbia and Montenegro, and Slovakia. It was co-financed by the World Bank, the Open Society Institute (OSI), the European Commission, UNDP, the Council of Europe Development Bank and the governments of Hungary, Finland and Sweden. The conference resolved to (a) establish a Decade of Roma Inclusion 2005-2015, during which countries would focus on reducing disparities in key economic and human development outcomes for Roma; and (b) establish an international Roma Education Fund (REF).

1.2 The mission of the REF is to contribute to closing the gap in educational outcomes between Roma and non-Roma, including through desegregation of educational systems in Central and Eastern Europe and the countries that have formally joined the Decade for Roma Inclusion.

1.3 The objectives of the REF are:

To reduce the educational gap between Roma and non-Roma children by providing better access to quality education;

To promote Roma inclusion in all aspects of the national education systems of countries participating in the Decade for Roma Inclusion, as well as others wishing to join in this effort ; and,

To combat segregation of Roma children in education systems.

2. Contextual background for the research

2.1 The topic of **teacher absenteeism** has been a relatively marginal area of the research agenda in European countries but it has excited more academic interest in the U.S.A. and particularly many other regions in the developing world. This topic, however, has a high priority in the REF's capacity building and policy development agenda. Given that the international research evidence strongly suggests that teacher absenteeism is higher and impacts more negatively on poorer and less empowered communities and, indeed, those with significant numbers of children from minority ethnic backgrounds, it is anticipated that this research exercise will shed new light on the causal factors behind the worrying underachievement and low participation of Roma children in education.

2.2 Over the past twenty or so years there has been a marked growth in research focused specifically on the educational ill-fortunes of Roma children and young people in almost all European countries, and particularly those participating in the Decade for Roma Inclusion. Many of these research investigations have been conducted by respected international organisations such as the World Bank, UNICEF, UNDP, OSI, the European Commission, the Council of Europe and Save the Children, to name but a few. The findings of most of this research betray a serious neglect by governments to the consequences of patterns of restricted access to education for Roma communities, chronically poor school attendance, premature 'dropout' and gross underachievement. A further cause for concern is the actual or de facto segregation of Roma children and young people into institutional settings that frequently lack quality educational provision and thus seriously damage educational opportunities and life chances. Apart from the fact that educational segregation in most European states represents unlawful discrimination, there is much research evidence that demonstrates that children who experience this reality suffer educationally in terms of substandard outcomes and also in consequence of imbibing social rejection and racism which, together, irrevocably damage their chances of happy and successful lives.

3. Aims and Objectives

3.1 The research that the REF aims to launch is intended to explore the possibility of a significant relationship between teacher absenteeism and Roma participation in the primary school system in Romania.¹ The working hypothesis will be that rates of teacher absenteeism will illustrate a positive correlation with the percentage of Roma pupils on the roll of the school. If the correlation were found to be statistically significant then there would be fundamentally important policy implications for teacher training, recruitment, school organisation, the design of neighbourhood school catchment areas, and particularly, segregated schools. A further dimension of this hypothesis, and one that is consistent with other international research findings, is that levels of student attendance will also possibly correlate with levels of teacher absenteeism. The possible relationship to Roma pupils' levels of attainment will not be attempted as part of this particular research contract although tentative conclusions may be drawn where evidence is obtained.

3.2 Patterns of segregation in public service provision may be the result of different income levels of particular ethnic and or social communities, a history of residential segregated settlement and in consequence of damaging social/ethnic exclusion. Irrespective of the determining antecedents, educational segregation is judged internationally to be unacceptable and illegal.² Extensive research evidence exists that shows that Roma communities in many European countries suffer the extremes of discrimination and segregation in education. This research proposal, therefore, further aims to confirm, or otherwise, the suspicions of educational inequality stemming from segregation and for any such findings to be rooted on sound empirical evidence. The findings of this research may further aid policy makers with supportive evidence for their legally prescriptive efforts to end Roma segregation in education.

¹ If the approach used in Romania, REF is considering extending it to other countries in the region.

² **United Nations (UNESCO) Convention against Discrimination in Education** - Paris – 14 December 1960. In the more recent set of recommendations in Section 11 Core Principles, sub-section 10, it states, "School policies or practices that, de jure or de facto, segregate students into different groups based on minority status violate the rights of minorities and rob the entire society of its best opportunity to foster social cohesion and respect for a diversity of views and experiences."

The Council of the European Union Directive 2000/43/EC – implementing the principle of equal treatment between people irrespective of racial or ethnic origin.

The European Convention on Human Rights and Fundamental Freedoms, 1950

3.3 It is also aimed to offer a new perspective to research work on teacher absenteeism in terms of assessing the potential impact of the attitudes and ‘feelings’ of provider stakeholders (particularly teachers) to the beneficiary group(s).

4. Tasks and Methodology

4.1 The research in Romania will involve a number of set tasks and methodological approaches to this difficult and complex research project which will depend on securing both quantitative and qualitative research evidence. The suggested methods are outlined below; however, tenderers are free to offer alternative suggestions where appropriate within their bid submissions.

4.2 **Literature Review:** The research team selected should become fully conversant with the literature on teacher absenteeism with the support and guidance provided within the literature review provided by the REF (See attached to research proposal). The research teams should also add any relevant literature of which they are aware, with particular emphasis on research conducted to date on teacher absenteeism.

4.3 **Analysis of the national picture:** It is expected that among the initial tasks the national picture will be explored and described in relation to teachers’ terms and conditions of employment, teacher qualification requirements and the regulations surrounding teacher attendance/leave and ‘sickness’ entitlements. In addition, it will be important to establish the nature and coverage of any system of ‘substitute teachers’ (or teacher assistants) covering classes for absent teachers.

4.4 **Other stakeholders:** The national picture should also include the personnel management role, function and powers of school principals/head teachers; also of school governing bodies; also of local authority administrations; also of the national school inspection service; and also of the Ministry of Education.

4.5 **Data reality check:** A further initial task will be to check what data exists on teacher absenteeism (sickness, training/conference attendance, personal etc.). The questions required to be answered include: What data is collected; by whom; at what frequency; how stored; with what named subcategories; with what access by the public; can the data analysis be linked to individuals/schools/municipalities/districts/regions/national; for how long is any data held and from which starting date; and what is its use and assessed reliability? If credible data exists with adequate access, it is expected that this will be used to set against the statistical data obtained by the main research activity.

4.6 **Data mapping exercise:** The main thrust of the research activity will be to gather independent data on teacher absenteeism in Romania focused on a national sample of state primary schools. The sample should be of primary/elementary schools with half of the schools being randomly selected on the basis of schools with no more than ten percent (10%) of its roll belonging to ethnic minorities. The other half of the sample schools should be selected on the basis of them having above ninety percent (90%) of their pupils on roll coming from Roma backgrounds. Sample choice information should be supplied by both Ministries of Education and local authorities and discussed with regional inspectorates. The former sample of schools will be known as ‘mainstream schools’ and the latter will be defined as ‘ethnically segregated schools’. The sample of all schools should ensure that there is an appropriate balance between regional differences; size of school; and urban/rural locations. Irrespective of the sample size, it will be important for the samples to be in equal balance between the two different types of school in terms of the ethnic background makeup of the pupils on roll and as described above. Research teams may wish to appoint and train locally based enumerators to assist with the work.

4.7 Data collection sequence: Prior to the second school semester (February 2011), sample schools will have been selected and written to by way of an invitation briefing letter. This will be followed by a meeting between research team members and school principals/head teachers. This will be followed up with a schedule of the number (10) of unannounced enumeration school visits for that semester. Enumeration visits will need to be ‘unannounced’ in an attempt to minimise the possible ‘distortion’ of data linked to prior knowledge influencing school and teacher behaviours. The visits should be evenly phased during the period and be so planned that each day of the working week will receive two (2) enumeration visits over the course of the semester. Each visit will be short and involve brief meetings with principals/head teachers, and or school administrative staff and for the scrutiny of written records. Teacher anonymity must be guaranteed at all stages of the enumeration process. The data retrieved must be managed in a way that will subsequently allow statistical analysis to illustrate significant differences in relation to school and personnel background details. (Data collection therefore will need to include details about gender, age, qualification(s), seniority position, length of service in teaching/school, weather conditions etc.)

4.8 Case study questionnaires: During the enumeration semester a pre-arranged visit will also be made by a member of the research team to each school in the sample to go through two specially prepared questionnaires: one for principals/head teachers and one for teachers. Apart from the questionnaire for the principal/head teacher, two or three classroom teachers will be asked on a voluntary basis to go through the teacher’s questionnaire with a research team member and with anonymity being ensured at all stages. The research team will have the responsibility of designing the two types of questionnaire but these will have to be finally approved by the project REF Research Management Team (RMT). The questionnaires should, however, aim to elicit the schools’ policy, provision and practice in relation to absenteeism and the attitudes of teachers to being absent from work; to their working environment; to their pupils and parental community; to their sense of ‘job satisfaction’; and to their training, knowledge and understanding of equal opportunities, race equality, discrimination and intercultural education.

4.9 Securing access to data and schools: The success of this research project will depend in large part on securing the willing cooperation of all the key stakeholders. Following the awarding of contracts an early meeting will be sought between the REF, their in-country contractor and the respective Ministry of Education. One aim of these meetings will be to agree on the establishment of a national Consultative Steering Group (CSG) that should be representative of all the key players.

5. Deliverables and timeframe

5.1 The research projects are expected to last from the awarding of contracts (October 2010) to the end of July of 2011. Below is a draft timetable which will be subject to a iteration in relation to circumstances and negotiated agreements between the management organ of the REF (Research Management Team (RMT)) and the successful contractors.

1. Invitation to bid - 30th July 2010
2. Deadline for bids to be submitted to the REF – 30th September 2010
3. Short listing meeting - 10th October
4. Final methodology of the study – 25th October 2011
5. Contracts awarded – 1st November
6. Meetings with successful bidders and the Ministry of Education – November 2010
7. Meetings with CSG – as appropriate throughout the life of the project
8. Enumerators selection, training and scheduling -end January 2011
9. Meetings with sample schools – First week of February 2011
10. Enumerators start ‘unannounced’ programme of visits – February
11. Visits to schools for questionnaire case studies – February – May 2011
12. Data and case study analysis by research team – March-June 2011

13. Draft reports – mid June 2011
14. Final reports – end of July 2011
15. Publication and launch conferences – September 2011
16. Meetings with stakeholders - discussions re policy implications of findings.

5.2 The successful contractors will be expected to deliver:

1. Minutes of all meetings with the Ministries of Education and with the CSG
2. Fortnightly emailed progress updates from time of start of contract
3. Written progress reports including the initial findings from the actions as listed under **Tasks and methodology** above in the TOR and for these to be suitable for presentation to the REF Research Management Team (RMT)
4. Interim reports on enumerator data evidence – November/December
5. Interim reports on questionnaire case study analysis November/December
6. Draft final reports – mid June 2011
7. Final reports – end of July 2011

5.3 The final reports should be written to the following or approximate structure:

1. An executive summary;
2. Details of the methodology used;
3. Description and discussion of the analysed findings;
4. Summary and conclusions; and
5. Recommendations.

6. Project management

6.1 The research project will be jointly supervised by the REF Research Management Team (RMT) under the leadership of:

Mihai Surdu, Research and Policy Development Manager

msurdu@romaeducationfund.org

See below for full contact details

The REF Research Management Team (RMT) have the following roles:

1. Select the organization which will carry out the research
2. Answer questions from the contractors as they arise
3. Facilitate the relationship with the Romanian Ministry of Education
4. Supervise and manage the research project
5. Approve the deliverables, including the research methodology
6. Check the quality and accuracy of the field work
7. Contribute to the elaboration of the final report by providing feedback and comments and co authoring parts of the research report which will be published.

The report to be published as a result of this work would mention the names of all contributors according with their roles, both in quality of organizations and individuals.

7. Tendering arrangements

7.1 The Roma Education Fund welcomes bids from research organisations and academic institutions which are willing to accept full responsibility for the timely delivery and quality of the work pledged to be undertaken via this research specification.

Proposals should be set out according to the following sections, with no more than 5000 words in total.

1. Background to the study demonstrating knowledge of the research area and

- interpretation of the issues surrounding Roma education;
2. Your understanding of the aims and objectives of the research;
 3. A discussion of the issues raised in the literature review (supplied), the research specification and possible ways to address them, including any other issues suggested by tenderers. The issues to address in the research should also be prioritised.
 4. A detailed outline of the proposed methodology, focussing on how the specific requirements of the research will be met and explored and how the quantitative and qualitative data will be managed, analysed and presented; the sample size should be indicated in the proposal;
 5. A risk analysis to identify the key risks to delivering this piece of work and the measures the team will take to offset these risks;
 6. An outline of how the research will be managed within the team and the contribution of different team members (in days); Relevant skills and experience of the team; and
 7. A full breakdown of the costs (in Euros) of carrying out the research under the following headings
 - a. salary costs for each project team member
 - b. other staff costs including the school visit enumerators
 - c. other administrative costs
 - d. fieldwork costs for research team when attending meetings and making school questionnaire case study visits
 - e. overheads (if charged)
 - f. other costs (with details).
 8. A one page summary of the tender.

Please attach to your research proposals the CVs of the main members of the research team.

Tenders will be evaluated according to the following criteria:

1. The knowledge and experience of the research team;
2. The extent to which the proposal meets the aims and objectives of the research, detailed in the research specification/TOR and the extent to which the proposal discusses the complex issues involved in the research;
3. The feasibility and efficacy of the methods proposed;
4. The ability to meet the timescale outlined in this research specification;
5. The ability to deliver accessible outputs suitable for a non-academic audience;
6. Due consideration of the risks involved in the work and the measures proposed to reduce these risks; and
7. Value for money.

Enquiries about this tender specification should be made to:

Mihai Surdu, Research and Policy Development Manager
msurdu@romaeducationfund.org
Roma Education Fund
Terez Krt. 46
Mark Centre
Budapest, 1066
Hungary
Phone : +36-1-235-8030