

Project Evaluation: Promoting more People-Centred and Rights-Based Approaches by Strengthening Dialogue between Civil Society and Public Development Banks

Terms of Reference

Deadline for submitting a proposal: 2 September 2024

Evaluation start date: 1 October 2024 (or sooner)

Location: Remotely

Forus is an innovative global network empowering civil society for effective social change. It brings together 69 National NGO Platforms and 7 Regional Coalitions from Africa, America, Asia, Europe, and Pacific.

Forus is seeking an external evaluator or team of evaluators to lead the Final evaluation of its 3-year (2022-2025) project “*Promoting greater people-centered and rights-based approaches by strengthening dialogue between civil society and public development banks*”. This exercise will also require an evaluation of 5 subgrants that have been established with Forus members as part of the project.

The findings of this evaluation will contribute to the project reporting to the donors.

The evaluation is expected to generate strong evidence on the impacts of Forus activities within the framework of the project. Likewise, the recommendations of the evaluation will enable the Forus network to continue strengthening its accountability and learning processes, as established in the Forus 2021-2025 Strategy.

1. Background on the project to be evaluated

The project is supported by the French Development Agency (AFD), and it was implemented at the global level with Forus national and/or regional members and the International Federation for Human Rights (FIDH). Forus’ support to its members included technical and financial support, this project allowed for 5 national subgrants to be allocated to members.

Project duration: from April 2022 to March 2025.

Objectives:

The overall objective of the project “*Promoting greater people-centered and rights-based approaches by strengthening dialogue between civil society and public development banks*” is to foster the coordination and engagement of a diverse civil society in “Finance in Common” (FICS) processes and other relevant development finance spaces to promote rights-based development finance and the ecosystem protection.

The project has three interlinked **specific objectives**, related to each of the aforementioned pillars.

1. Objective 1: Strengthen CSOs' expertise on financing for development and their ability to influence Public Development Banks (PDB) policies, procedures and operations.
2. Objective 2: Strengthen coordination within civil society to enable CSOs to take collective action to influence PDB policies, procedures and operations and promote a rights-based approach.
3. Objective 3: Ensure that the voice of civil society, local organizations and communities affected by PDB investments is fully heard in the dialogue with PDBs at national, regional and international levels.

Key project activities include:

- 1) (SO1):
 - a. Multilingual capacity-development and peer exchange activities around PDB actions and the rights-based approach.
 - b. Pilot projects at national/regional level developed by 4 national platforms and 1 regional coalition.
 - c. Facilitation of the Forus 'Financing for Development' working group.
 - d. Development of capacity building and awareness building resources including a toolkit or manual of good practices, videos and podcasts.
- 2) (SO2):
 - a. Collaboration and coordination between civil society actors.
 - b. Participation in the FiCS Executive Committee and share the perspectives of its network as well as its partners.
 - c. Coordinated monitoring by the 5 national/regional partners of selected PDB activities, including commitments made by PDBs at the FIC summits.
 - d. Mapping of the relationship between Forus members and PDBs in the form of a study with a particular focus on 4 countries and 1 region.
- 3) (SO3):
 - a. Facilitation of CSO participation in FICS events and dialogue fora.
 - b. Organisation of side events to the FICS by the CSO coordination group.
 - c. Exchanges with PDB directors and representatives on human rights and rights-based approach issues and possibly on some thematic priorities to be defined.
 - d. Creation of a report on the human rights impacts of PDBs projects, presenting case studies on local impact.
 - e. Communication campaign in collaboration with advocates and CSOs, focusing on PDB or PDB-related issues.

2. Purpose & scope of the final evaluation

The final evaluation will focus on the progress made in achieving overall and specific objectives of the project, with a particular focus on the impact and effectiveness of Forus' support to strengthen its members capacities to promote people-centered and rights-based approaches through enhanced dialogue and collaboration between civil society and public development banks.

The overall purpose of the final evaluation is to:

- **collect evidence** of impact and change by evaluating both qualitative and quantitative data against a selected set of projects indicators, capturing achievements of the project's results and indicators
- **draw lessons and concrete recommendations** for enhancing the quality of Forus activities and support to national and regional members, contributing to the project's learning
- **showcase examples** of outcomes and lessons learnt
- **contribute to strengthening accountability practices** within the Forus network
- **provide preliminary results** to be used for a grant renewal proposal. These preliminary results should be delivered by mid-November.

Key evaluation questions:

The Consultant will include an estimate 12 to 15 interviews with key project stakeholders, including 3-4 Forus members (subgrantees); lead donor (AFD); consortium partners (FIDH), FICS Secretariat (based at AFD); members of the Informal CSO Mechanism on FICS; members of Forus' Financing for Sustainable Development Working Group; and 1-2 representatives of public development banks.

1. (SO1): Determine the extent to which Forus contributed to enhancing the knowledge of its members and other CSOs on PDBs, the FICS and other relevant financing for sustainable development (FfSD) initiatives.

- a. Evaluate the efficiency of the project: i.e. has the support received by Forus aligned to the project ambitions and the activities carried out?
- b. What capacity strengthening deliverables (learning tools) were developed during this project? Are they suitable? How have the capacity strengthening deliverables been disseminated and what impact have they had on development actors (Forus members; members' members at national and local levels; CSO partners; and key FICS stakeholders).
 - i. Evaluate the effectiveness of Forus in enhancing the knowledge and capacities of its members in the understanding of the role of PDBs, the FICS process and other relevant FfSD fora.
 - ii. Evaluate the effectiveness of Forus in promoting people-centered and rights-based approaches.

- iii. Examine the impact of workshops /meetings/ webinars (FfSD working group meetings) and other support mechanisms, including subgranting activities provided by Forus to its members.
 - iv. Examine how Forus has been able to strengthen Forus member engagement in relevant FfSD international meetings (i.e. the New Global Financial Summit; G20/C20; BRICS Summit/Civil BRICS; UN HLPF; Summit of the Future, etc). This extends to engagement in dialogues/events with PDB decision-makers and relevant stakeholders; development of advocacy strategies; statements and positions; and communications / media initiatives; and other.
 - v. Describe the ways and extent in which the project research deliverables (FIDH Human Rights report; Forus PDB Engagement Study and Toolkit; PDB national, regional and global mapping studies) assisted Forus members and/or partners in delivering on the project objectives.

- 2. (SO2): Determine how effective Forus was in strengthening the links between CSOs and PDBs?
 - a. Evaluate if Forus provides a space for CSOs to develop joint actions to influence PDBs.
 - b. Evaluate how the project enabled more effective advocacy, dialogue, and collaboration of CSOs with public development banks.
 - i. To what extent has Forus coordination (in role as CSO Mechanism on FICS lead; support to members / partners to engage in the FICS and related processes/initiatives; research outputs; and subgranting activities) increased Forus members' and key allies' ability to hold PDBs accountable?
 - ii. To what extent have the project's interaction modalities (i.e. dialogue between PDBs and CSOs) and the FICS governance structure (including role of Forus as a FICS Executive Committee member) enabled or restricted the achievement of the project objectives?
 - iii. To what extent have Forus' strategic partnerships, including with FIDH (consortium member) helped achieve the project objectives to influence PDBs? What could be useful recommendations for Forus/partners to consider for the continuation of the project?

- 3. (SO3): To what extent has Forus contributed to amplifying the voices of civil society, local organizations and communities affected by PDB investments in certain fora for dialogue and decision-making on development financing at national, regional and international levels?
 - a. How has Forus improved CSO engagement in the FICS and other relevant fora, including engagement by community-based organizations and indigenous communities?
 - i. To what extent has Forus assisted CSOs and community representatives in having direct engagement in the FICS in 2023 vs previous FICS (2020-

2022) in terms of assisting CSOs to engage in the formal program of the FICS (plenary sessions; side events; other activities)?

- b. Evaluate the communication strategy in support of the project objectives.
 - i. To what extent has Forus assisted Forus members, CSO partners and local representatives in having their voices heard at FICS and through support in campaigning, advocacy and communications / media activities at the FICS and other relevant FfSD fora?

Cross-cutting questions:

- a) Does the project actively contribute to the promotion of Human Rights? How could it be improved?
- b) How have the cross-cutting dimensions been considered in the programme: environment/climate/youth in addition to gender?
- c) Determine the sustainability and long-term impact of the capacity-building initiatives, including the ability of members to continue applying and disseminating the knowledge and skills acquired.

The audience of the evaluation will be:

- a) Forus' decentralized Secretariat team and governance: for mapping out reflections and lessons learnt related to project activities.
- b) Members and partner organizations (in particular, institutions and CSOs that collaborate with Forus on advocacy and campaigning) may be interested in the results and lessons learned from this evaluation.
- c) Other external stakeholders (e.g., French Development Agency; FICS Secretariat; PDBs; think tanks): for assessing the impact of the network's activities, and/or the effective and efficient use of the funding to achieve stated goals and results of the project

3. Evaluation approach and methods

The evaluation will be carried out by a specialized consultant or team of consultants reflecting the intercultural nature of the Forus network. The Secretariat team will support the steering of the evaluation, the result of which will be shared with Forus' governance.

Contributions from members will be used to determine the perception, image and added value of Forus to its members. The evaluation shall be conducted remotely and will also include a desk review, questionnaires and/or interviews with key Forus members (e.g. subgrantees) and partners (e.g. FIDH, FICS Secretariat) and external stakeholders. It will also pay attention to lessons learnt on project methods and strategies and determine the overall relevance, effectiveness, impact, and sustainability of the project.

The evaluation will develop and apply a rigorous analytical framework to identify the impact of Forus in the above-mentioned areas. Evaluators are expected to detail this framework in the technical offer.

The evaluation will draw out how Forus contributed to the impact of its members' advocacy work, particularly around people-centered and rights-based approaches and public development banks. Consultants will be expected to collect data from a cross-section of representatives of Forus members and external partners, including a diversity of respondents and different levels of seniority. Interviews of a minimum of 5 external partners, (e.g., representatives of donor agencies, national governments, and partner CSOs) are to be conducted. Case studies of Forus members could also be included, if relevant. The list of interviewees and subjects for the case studies will be determined with Forus at the inception phase. The evaluation methodology and data collection tools will also be determined during the inception phase. Likewise, the Forus Secretariat will also provide the evaluators with key data from the Forus MEAL systems during the inception phase.

Principles underpinning the evaluator's **approach** are:

- Participatory and culturally sensitive process valuing knowledge and approaches from within the context
- Impartiality and independence of the evaluation process from the programming and implementation functions
- Credibility of the evaluation, through use of appropriately skilled and independent expert
- Transparency of the evaluation process, including wide dissemination of results
- Usefulness of the evaluation findings and recommendations, through timely presentation of relevant, productively critical, clear, and concise information, and commitment to building capacity and providing effective operational recommendations for the continuation of the project. The evaluator may refer to the Critical Friend methodology.
- The evaluation must have a cross-cutting consideration for inclusion, ensuring that factors related to gender, culture, and language are addressed.

The evaluation will consist of the following **phases and deliverables**:

Phases: The evaluators will work closely with the Forus Secretariat, in particular with the project coordinator, ensuring regular communications and meetings throughout the different phases. Support for the logistical aspects of the evaluation can be provided by the Forus Secretariat.

- a. Contracting: contract is signed, and a discussion of the assignment takes place. First documents and key data are provided to the evaluator.
- b. Inception phase: a kick-off meeting and an inception meeting will be held. Submission of inception report (which describes a proposal for the design of the evaluation and elaborates on how data will be obtained and analysed). The Forus Secretariat will also

provide quantitative and qualitative data to evaluators from the Forus' Monitoring, Evaluation, Accountability and Learning (MEAL) systems. Data triangulation and quality control are very important and need to be discussed in the inception report. Evaluation questions and evaluation matrix will also be discussed and validated at that stage.

- c. Evaluation phase: The evaluator studies all necessary project documents and data; re-constructs and analyses the intervention logic and its assumptions. It is expected that data and information will be obtained through different methods such as: analysis of documents and data, online interviews (with a limited number of persons), online-survey (if applicable), others. (No field trips to visit the partners and members are foreseen).
- d. Preliminary findings report: This report will include key findings that have been previously agreed upon and will be used for the grant renewal proposal.
- e. Final draft report: Submission and presentation of final draft report. Inclusion of comments from partners and Forus. Final delivery: submission of final deliverables. Presentation of final evaluation findings to the project's main donor (i.e. French Development Agency) together with Forus staff.

Deliverables

- a) Inception report, including a detailed methodology, list of interviewees and tools for the evaluation
- b) Preliminary Findings Report to be shared in mid-November.
- c) Draft and final evaluation report in English addressing the evaluation questions and including:
 - i. Executive summary of key findings and recommendations
 - ii. Interviews summary (timeframe: week 2- 3).
 - iii. Evaluation findings, analysis and conclusions with associated evidence and data clearly illustrated. Use of tables, graphs, quotes, anecdotes, and stories to illustrate findings and conclusions is encouraged:
 - Preliminary report on findings (timeframe: week 3 – week 4 at the latest).
 - Forus Secretariat will provide support on this section, in order to contribute to the final version.
 - iv. Case studies (if relevant) to illustrate stories of the impact of Forus and its members on specific policies, processes and fora related to public development banks.
 - v. Recommendations for the next actions, which should be practical and linked directly to conclusions, these should include the identification of any gaps in the capacity-building efforts for enhancing Forus ability to support its members in the future.
 - vi. Appendices, including methodology and evaluation tools, list of interviewees, questionnaire, and brief biography of evaluator.
- d) Two presentations of final findings: to Forus team and governance, and to the main donor.

Final payment is dependent on the submission and approval of the final evaluation report and delivery of two presentations.

6. Profile and qualifications of the consultant

Applicants may be individuals or a team of consultants. As a diverse network, Forus encourages mixed teams, with different backgrounds and genders.

Key qualifications:

- Relevant academic degree (master/PhD level)
- A minimum of ten years' experience and expertise in the non-profit sector, preferably networks in the field of development and linked to networks
- At least three evaluations in the last five years, ideally impact evaluations, and focusing on advocacy, policy, campaigning, or communication work implemented by NGOs. Knowledge about International Financial Institutions is an asset.
- Demonstrated experience of evaluation involving qualitative data and 'soft' outcomes.
- Demonstrated experience of evaluating multi-country projects
- Working experience in several countries and continents
- An understanding of the nature of capacity development work and advocacy activities
- Experience in project cycle management
- Excellent oral and written English skills.
- Capacity to study documentation and conduct interviews in French and Spanish is a strong asset.

7. Application procedure

The application documents must be submitted no later than 2 September 2024 in electronic format to the following address: recruitment@forus-international.org specifying "Final Evaluation – AFD FiC project" in the subject line.

The application should include:

- a) A technical offer including:
 - Evaluation methodology: Describing your overall approach and evaluation methodology including, but not limited to, evaluation questions, evaluation design, proposed tools, and methodology
 - Understanding of the issues at stake and the Terms of Reference
 - Relevant experience: Provide details of projects of similar scope, complexity, and nature you have worked on previously
 - Specific expertise: Financing for Sustainable development, Multilateral Development Banks, international networks
 - Key personnel and staffing: Describe key personnel who will be part of the proposed plan and include their CVs (max. 2 pages each and attached as annex)
 - Timeline: Include a detailed timeline of key activities

- Three references (including telephone numbers) and web links to previous work (if available)
- b) A detailed financial offer including:
 - A line-item budget: The cost estimates used to prepare the budget should be presented in Euros (including VAT and any other taxes). The tenderer should include their proposed daily rate, including all costs
 - A budget narrative

The maximum budget for the evaluation is EUR 10,000 including all taxes and costs.

Applicants should clearly highlight any current or previous working or personal links to Forus, as well as any risk around conflict of interest.

4. Provisional calendar

Deadline for applications	02 September 2024 (by 15:00 GMT)
Selection of candidates / Interviews	02-11 Sept 2024
Contracting	1 October (or sooner) 2024
Inception phase, including kick-off and inception meetings	1st week of October 2024 (pending contracting date)
Evaluation phase	October- November
Preliminary findings report	Mid- November, not later than 30 November.
Final delivery of report	First week of December
2 Presentations of the report	December 2024 / January 2025