Call for proposals
Consultancy to undertake a developmental evaluation for pilot campaigns under Oak’s Environment Programme

Overview

Oak Foundation is seeking expressions of interest from individuals or teams to carry out a developmental evaluation and learning facilitation of seven (+2) pilot campaigns and initiatives under the Environment’s Programme new strategic framework (2021-2025).

Background

Oak Foundation commits its resources to address issues of global, social and environmental concern, particularly those that have a major impact on the lives of the disadvantaged. Oak Foundation is family-led and reflects the vision and values of its founders. In all its work Oak pursues rights-based approaches, gender equality and partnership with the organisations we fund. We support civil society as a pillar of democracy and justice and nurture innovation and visionary leadership within it.

In 2020, the Environment programme (EP) commissioned an external evaluation of its strategic framework (2016-2020) as the basis of a strategy refresh for the period 2021-2025. The new strategic framework has evolved from a sectoral approach, which focused on climate, marine, and wildlife trade and conservation, to a global systems transformation approach. Oak Foundation wants to leverage its unique position and perspective to contribute to the transformation of the systems of interest that are key to sustaining human life: energy, food, and natural security. Oak’s strategy will be available on our website in May.

Aware of this highly uncertain and disruptive moment generated by the health, economic, and social crisis, the EP is adopting the following approach:

1) programme strategy that provides the vision, sets the goals, and outlines the key pathways for systemic transformations to guide mid-term grant-making choices; and

2) seven relatively small pilot campaigns that will be experimentally deployed in the initial two years.

Building on the successful experience of Oak’s grant-making in the area of plastics, these pilot campaigns that Oak will support through grant-making will allow for flexible and nimble responses to windows of opportunity.

Each campaign is led by a programme officer (PO). The POs have already co-designed the general strategy and agreed on objectives with grantees and coordinating partners. The PO’s direct involvement in each campaign will vary and is expected to be light touch. Overall, the coordinating partner will play the most active role in the campaign work. Campaigns will be funded through several fiscal sponsors (Swiss Philanthropy Fund, Give2Asia, and World Resources Institute).
The campaigns will focus on the following issues:

- flattening the curve of aviation growth;
- ensuring European imports are deforestation-free;
- promoting healthy and sustainable diets through catalysing leadership from Chinese e-commerce, retailers, and consumers;
- reducing use of pesticides in Europe and Brazil;
- reducing antibiotics in industrial-level animal husbandry in Europe;
- ending extraction of offshore oil/gas; and
- promoting bottom-trawling bans

In addition, there are two other Oak supported campaigns that should be mentioned in the scope of this request for proposals. The first is the Okavango Delta campaign which will challenge the exploration for oil in a protected area home to the largest herd of Africa elephants - in both Botswana and Namibia. The second is the Healthy Food, Healthy Planet campaign which will catalyse a powerful inter-sectoral movement starting in Europe to transform the food system so it’s healthier for people, the planet, and animals.

At this stage, these two campaigns have a different scope and timeframe than those listed above. Nonetheless, they are included in the scope of this work because of the potential contributions they can make to the learning about campaign models and tactics. The main difference from the other campaigns is that the involvement of the developmental evaluator(s) will be mostly indirect, mainly to harvest insights and observations about how the campaigns are being designed and deployed, but without engaging directly on their design and deployment.

**Purpose and objectives**

The objective of this consultancy is to help the EP team and campaign partners to guide the design and development of these campaigns and learn more about campaign models through developmental evaluation (DE) and facilitation of emergent learning.

Each of these campaigns has a different coordination arrangement, is at a different developmental stage, and has a different way of identifying and engaging sub-grantees. This means the DE will need to be tailored to the unique needs and context of each campaign. This said, we expect a coordinated, integrated learning process, so similar principles, frameworks, and tools can be used across all the pilot campaigns.

The purpose of the developmental evaluation and learning approach for the campaigns is three-fold:

1. Embed evaluative thinking, real-time data, and insights and reflective practice in the way these seven campaigns are being designed and implemented.
2. Bi-annually and at the end of the initial two-year period, provide the EP team at Oak with a clear picture of what has been achieved and current state of play in each of these campaigns, and identify any connections with other elements of the EP strategy, to inform decisions about scaling, sustaining, re-planning, or exit.
3. Help the EP team at Oak and its partners to learn about campaigns, movement building, policy advocacy, and related strategies and tactics for systems change, so that they can play a more effective funder role. This includes learning about the different campaign models the EP is funding (seven campaigns + additional two).
This means the DE and learning approach will happen at three levels that are inter-connected: the campaign or initiative; the Oak PO responsible for each campaign with the campaign convener/coordinator (when appropriate); and the EP team. The developmental evaluator will become a sort of scuba-diver and waver who connects different realities, spaces, and levels of reflection and decision. They will undertake rapid dives in each campaign reality and eco-system, and capture the main insights of what they observe to feed into reflection and decision-making processes at the three different levels.

**DEL design elements already in place**

The internal conversations held so far to inform this request for proposals have revealed the following:

- The DE and learning approach need to be tailored to each campaign context and management arrangements.
- The level of effort to manage these campaigns needs to remain low for Oak’s programme officers (PO). So does their engagement on learning activities.
- The developmental evaluator(s) will engage with each of the campaigns and will work closely with the main stakeholders in each case (depending on how the campaign has been set up: PO, campaign coordinator, convener, or re-granter), to capture insights and facilitate sense-making whenever appropriate.
- The evaluator will also report back to the Oak PO (level 2 in diagram above) and the Oak team (level 3 in diagram above) on a regular basis through bilateral engagements or team sessions, but keeping the learning process very lean, focused and “ready for consumption”. In the words of a PO “The partners are the ones doing the learning, but we also need to see and access that learning.”
It is also worth mentioning that, as part of the monitoring, evaluation, and learning (MEL) plan for the new strategy, the team has already made substantial progress in preparing for this DE. By the time the developmental evaluator(s) come on board, the following elements should already be available:

1. Overview of campaigns objectives, stakeholders, developmental stage, and learning priorities.
2. A brief guide for the EP team and the re-grantees presenting the developmental evaluation and learning approach. This guide will cover at least, the following aspects: what is developmental evaluation and how will it be used in this context; its working principles; roles and expectations of those involved; and a proposed roadmap to introduce DE in each of these campaigns.
3. A plan common to all the seven initiatives to implement the DE and learning approach that is proportionate, fit-for-purpose (manageable by the coordinator and the Oak team), and feasible with the available budget.
4. An individualised (brief) DE and learning plan for each of these initiatives, with initial learning questions when possible and appropriate.
5. An emergent learning log template to organise the data and insights from the DE for each reflection cycle.
6. A reporting tool that captures the questions and areas that the evaluator(s) will report against to Oak.

**Scope of work and indicative level of effort**

By definition, a developmental evaluation needs to be flexible and responsive to the emerging needs. We anticipate an initial planning phase where the details of how this DE will be implemented will be agreed with the evaluator(s), including moments to adapt and adjust the DE itself as needed.

However, for the purpose of providing some parameters for the potential applicants, here is an initial indication of how we imagine this DE:

- **Rapid dives within each initiative:** in close coordination with the campaign coordinator/convening, a combination of data collection, and on-going engagement with sub-grantees within each initiative, using coordination and collaboration spaces that already exist (e.g., planning moments, coordination calls, debriefs, etc.). Frequency to be determined case-by-case.
- **Learning debrief and reflection with each PO** (and possibly other partners) about each individual campaign every six months.
- **Learning debrief and reflection with the EP at Oak** about the common aspects of the campaigns or common learning questions, every six months.

All activities will be carried out virtually and across different time zones, with stakeholders based in the Americas, Europe, Africa, and Asia.
We anticipate between up to 136 days of work distributed over a 30-month period, allocated approximately as follows:

<table>
<thead>
<tr>
<th>Activities and deliverables</th>
<th>Days (approx.)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Orientation and planning</td>
<td>3 days</td>
</tr>
<tr>
<td>Campaign dives and other data collection (approx. 8 days/campaign over total period)</td>
<td>56</td>
</tr>
<tr>
<td>4 six-monthly campaign learning debriefs with PO, including documentation, preparation, and debrief (approx. 1 day/each campaign debrief)</td>
<td>28</td>
</tr>
<tr>
<td>5 six-monthly learning sessions with EP team, including preparation and facilitation (approx. 3 days / period) + 2 days additional synthesis in preparation for the final learning session</td>
<td>17</td>
</tr>
<tr>
<td>1 Learning summary for each campaign, at the end of 18 months period (approx. 2 days/learning brief/campaign)</td>
<td>14</td>
</tr>
<tr>
<td>On-going internal coordination, co-creation, communication, and planning</td>
<td>18</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>136</strong></td>
</tr>
</tbody>
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**Timeframe**

The team is ready to start this work as soon as the consultant is available, ideally from June 2021. The initial duration of the campaign pilots is approximately 24 months, but some grants will start sooner and others later. Hence, we estimate that the duration of this assignment is approximately 30 months (June 2021-December 2023, with most of the work happening between June 2021 and November 2022, when decisions about continuation, scaling, or exit will most likely happen).

**Payment schedule**

Payment schedule can be negotiated with the consultant or lead consultant in the case of a team. Our initial proposal is to organise it in five instalments, upon invoice, based on actual time used during the period to be invoiced.

| Payment 1 | December 2021 |
| Payment 2 | June 2022     |
| Payment 3 | December 2022 |
| Payment 4 | June 2023     |
| Payment 5 | December 2023 |

**Ways of working**

This consultancy will be managed by Paul Nichols (EP) with technical support from Marta Arranz (Senior MEL Advisor).
To allow for deep, honest learning, we believe in designing intentionally for a genuine partnership with evaluators who share our values and collaborative working style. The team anticipates a co-creative approach, with frequent check-ins and transparent decision-making so the DE can be adjusted and adapted in real-time based on what is emerging and what is collectively agreed. We commit and expect commitment to mutual learning, mutual appreciation, and care. We also aim to build high levels of trust with the evaluator and learning facilitator, so that we can share risks and go deeper in our learning.

Skills and experience

The consultant or consulting team are required to bring together the following skills and experience:

- Convincing experience in developmental evaluation design and implementation in complex, rapidly evolving interventions. Familiarity with emergent learning frameworks and tools is a significant advantage.
- Deep understanding and experience with different campaign models and tactics, including using digital tools.
- Experience and wisdom to quickly understand when and if pilot campaigns with several organisations working in coalition or network have potential for scale up or not, and if so, what is enabling or hampering such potential.
- Proven ability to work on global issues across different cultural and geographic contexts, particularly in the geographic areas where the campaigns will focus.
- Excellent analytical skills, with the ability to see intersections and threads between each of the campaigns and the synergies with Oak’s strategy.
- Ability to organise and communicate complex information from multiple sources in clean, succinct learning briefs, so that findings can be easily used by strategists and decision-makers.
- Excellent communication and group facilitation skills, in support of collective enquiry, sense-making, learning and decision making.
- Positive, proactive and flexible attitude to adapt to different working culture and environments.
- Interest and curiosity for the work at hand, including exploring learning edges with the client.

The following skills and experience are desirable:

- Familiarity with the philanthropic field, grant-making mechanisms, and philanthropic partnerships.
- Experience with two or more of the thematic areas relevant to the campaigns.
Proposals

Interested consultants are invited to submit a brief proposal that includes:

- A brief cover letter introducing the team, explaining what it brings to this assignment and why the team is interesting in conducting this work (1 page or less).
- A brief resume or CV (1 page per team member). For organisations, please include a brief summary of the organisation's mission and background.
- An indicative budget.
- A writing and visual communications sample of a learning brief, blog, or similar from the lead consultant.
- The name and contact information for two recent clients who are willing to provide a reference.

Proposals will be submitted via email to Paul Nichols (paul.nichols@oakfund.ch) by end of Friday 7 May 2021 (local time where the consultant is based).

Please note that interviews with shortlisted candidates or teams will be conducted on 19-21 May 2021, in PM time for Central European Time.

For more information about this RFP please contact Paul Nichols (paul.nichols@oakfund.ch)