End of Programme Evaluation Terms of Reference

Aviva WWF Partnership

March 2024

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| Project / Programme Name(s) | **Aviva & WWF Partnership** |
| Project / Programme Location(s) | **U.K. and Canada** |
| Names of Project/Programme Executants | **Led by WWF-UK Partnership Team** |
| Project/Programme Duration (from start year) | **June 2021 – June 2024** |
| Period to be Evaluated | **All** |

**Overarching purpose:** The overall aim of this is to conduct an end of programme evaluation to assess impact, effectiveness and sustainability.

**Background:** WWF is one of the world’s largest independent conservation organisations, active in nearly one hundred countries. Our supporters – more than five million of them – are helping us to restore nature and to tackle the main causes of nature’s decline, particularly the food system and climate change. We’re fighting to ensure a world with thriving habitats and species, and to change hearts and minds so it becomes unacceptable to overuse our planet’s resources.

**WWF and AVIVA Partnership Overview:**

Since 2021, WWF and Aviva have been working together to restore UK and Canada landscapes and seascapes, build healthier more resilient communities and help transform one of the biggest indirect drivers of climate change: the UK finance sector. Together, we are making a difference across three pillars:

1. **Transforming the Finance Sector:** In 2019, the UK Finance sector financed 805 million tonnes of CO2 through lending and investment activities making it one of the biggest emitters of CO2 in the world. Together, WWF and Aviva are working towards transforming the sector to help slow climate change: we are calling on the UK government to ensure they deliver on their climate and nature commitments and are providing thought leadership within the UK finance sector, influencing climate-focused financial companies to join the journey in moving towards a net-zero, nature positive future.
2. **Building Climate Resilient Communities and restoring nature:** we’re living through a climate and nature emergency, seeing extreme weather events across the globe due to climate change. Together, we’re developing projects that work with nature to help reduce the effects of extreme weather, particularly flooding, on communities in the UK and Canada. We are introducing physical interventions, harnessing nature to restore habitats; helping communities be more aware of the value of nature; and advocating for political and financial backing of resilience measures. In Canada, Aviva have invested in WWF-Canada’s Nature and Climate Grant Program to help local groups and indigenous organisations to restore degraded lands and shorelines, improving habitats and carbon capture.
3. **Encouraging action by Engaging People:** We are working to engage people across Aviva’s core markets in Canada and the UK, inspiring employees, local communities, individuals, and businesses to take better choices for the planet. In the UK, the Save Our Wild Isles Community Fund has empowered thousands from less economically advantaged communities to bring their local, natural world to life whilst Aviva employees have had the opportunity to volunteer in Ingleborough, Norfolk and Firth of Forth, strengthening their personal and community climate resilience. In Canada, Aviva employees have used their volunteering leave to volunteer in their communities and take part in fundraising opportunities such as WWF’s CN Tower ‘Climb for Nature.’

**Overall Partnership Objectives:**

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| **Partnership Goals** | **Objective** |
| **Transforming the finance sector:** Financial institutions have a vital role to play in the transition to a sustainable future, and together with Aviva, we are striving for a transformational shift in the sector to help slow climate change – a shift without which the UK will not be able to meet its net zero target. We will also make joint calls on the UK government to ensure they deliver on their climate and nature commitments and push for even greater and faster ambition. | **Objective 1:** Accelerate the alignment of financial markets with net zero and nature positive outcomes by leading market best practice and calling for policy change |
| **Building climate resilient communities and restoring nature:** We believe protecting nature and restoring biodiversity are inextricably linked to reducing climate change and helping deal with its impacts. During our partnership we’re developing projects that work with nature to help reduce the effects of extreme weather, particularly flooding, on communities in the UK and Canada. | **Objective 2:** Effectively implement nature-based solutions to mitigate against the impacts of climate change |
| **Objective 3:** Advocate for the value of nature-based solutions to mitigate the impacts of climate change |
| **Encouraging action by engaging people:** We'll be engaging people across Aviva's core markets in the UK and Canada, inspiring and empowering local communities, individuals, employees, and financial institutions to better understand the power of their individual choices and help them take action for our planet and create a world where people and nature thrive together. To date, Aviva colleagues in the UK have volunteered over 3,000 hours on our partnership projects.\*  \* 3,024 hours volunteered between July 2022 and March 2024. Hours recorded by local delivery partners. | **Objective 4:** Inspire and enable people to take action and mobilise communities to strengthen climate resilience |
| **Objective 5:** ​Drive sustainable financial choices, through co-branding and promotion of “green” products |
| **Objective 6:** Drive recognition and reputation for Aviva and WWF as climate leaders (amongst Financial Services) |

**Relevant Links and Documents:**

[WWF & Aviva partnership annual report 2022-2023 | WWF](https://www.wwf.org.uk/our-reports/wwf-aviva-partnership-annual-report-2022-2023#:~:text=Since%202021%2C%20WWF%20and%20Aviva,change%3A%20the%20UK%20finance%20sector.)

[Aviva and WWF - Aviva plc](https://www.aviva.com/sustainability/aviva-and-wwf/)

[Working with Aviva to act on climate change | WWF](https://www.wwf.org.uk/who-we-are/who-we-work-with/aviva)

[Aviva and WWF joint reports - Aviva plc](https://www.aviva.com/sustainability/taking-social-action/aviva-and-wwf-joint-reports/)

[Save Our Wild Isles Community Fund | Save Our Wild Isles](https://www.saveourwildisles.org.uk/community/fund)

*\*Including reports planned to be published between April – July 2024*

**Evaluation scope and objectives:**

In June 2024, the original three-year partnership and main objectives will conclude. Currently we are undergoing a 6-month extension process pending finalisation for some additional KPIs. However, the overall aim of this exercise is to deliver an end of programme evaluation to this phase of the WWF-Aviva partnership in the U.K. and Canada. The objectives of the evaluation are:

1. To provide an independent assessment of the overall partnership (and projects within), with a particular focus on the impact of the partnership and outcomes achieved.
2. To validate the results of our work, establish whether we successfully delivered our shared objectives, with special interest in understanding the likely long-term impact of our efforts.
3. To outline key areas of learning from the successes and challenges, to provide recommendations to strengthen possible future partnership phases.

The evaluation scope should include the overall Aviva and WWF partnership that includes:

* Overall partnership
  + Vision, ambition, outcomes, and impacts (*5% of focus time)*
  + Partnership structure and objectives (*5% of focus time)*
* Partnership components
  + Realignment and thought-leadership pillar and influence on society through our work on sustainable finance (*25% of focus time)*
  + Resilience work under pillar 2, incorporating learnings from the reported KPIs to understand overall impact in UK and Canada (*35% of focus time*)
  + Community engagement, public campaigns and Aviva staff engagement (such as volunteering and education) impact and benefit (*20% of focus time)*
  + Brand activations and communication outreach (*10% of focus time)*

Evaluation questions

Impact:

1. What is the impact of the partnership? Consider each pillar and the partnership.
2. Did the partnership achieve the objectives that were laid out initially?
3. Did the program produce or contribute to the intended Hero outcomes?
4. Highlight challenges faced and addressed throughout the partnership?
5. What were the new opportunities that were explored over the course of this partnership?
6. Were there any unintended outcomes – positive or negative?

Sustainability

1. What results are likely to be sustained post-partnership? What legacy will be left?
2. What results will require some support (financial, technical, or other) to be sustained post-partnership?

Relevance

1. Was the programme well designed in response to identified issues?
2. Do all the elements of the programme add up to a necessary and sufficient approach to achieving programmatic success?

Efficiency

1. Were there sufficient resources to deliver the programme?
2. Did the programme provide value for money?

Effectiveness:

1. Was the partnership effective in delivering desired/planned results at each level of the results chain?
2. To what extent did the Project’s governance and management approach contribute to meeting project results?
3. How effective were the strategies and tools used in the implementation of the project?
4. How effective has the project been in responding to the needs of the beneficiaries, and what results were achieved?

**Key outputs expected.**

1. Inception report to outline methodology
2. Draft Final report including Draft Key Findings and recommendations
3. Programme workshop to discuss findings and recommendations.
4. Final Evaluation report.

**Methodology Expectations and Considerations:**

It is anticipated that the evaluation will take a mixed-method approach to optimise information generation and corroboration. This may include:

* Desktop review – review of key documents relevant to the partnership (e.g. original RFP and submissions, workplans, technical reports, implementation documents) to inform evaluation design and identify key issues.
* Key stakeholder interviews (remote and/or in-person) to engage with relevant WWF and partner staff, beneficiaries, and stakeholders (if appropriate).
  + For the evaluations of impact in Canada, WWF and Aviva will facilitate virtual meetings and engagement as needed; travel to site will not be expected or required for this evaluation.
* Outcome harvesting or Most Significant Change; Objective level workshops (online or in-person to be proposed by evaluation team); Program level workshops (online or in-person to be proposed by evaluation team).
* Collation and presentation for discussion of findings, learning and articulation of recommendations

**Proposed payment schedule:**

**Payment on completion of final report**

100% of the payment for the contract will be done at the submission of the final evaluation report at the end of the project.

**Roles and responsibilities [*if applicable*]**

WWF-UK is leading this piece of work, with close participation from Aviva and WWF-Canada.

The supplier shall:

* be under the direction of the WWF staff managing this project.
* commit to regular check-ins with WWF (at least weekly/fortnightly/monthly) and inform WWF if and when issues arise between these check-ins.

WWF shall:

* Collaborate closely with the selected supplier.
* Provide feedback on draft versions of the report.
* Provide a list of resources which can be used as a starting point for research (including prospective interviewee names and documents).
* Be on hand to answer queries.
* Provide final sign-off of report.

Aviva shall:

* Be informed of progress and consulted if issues arise.
* Provide feedback on draft versions of the report.
* Facilitate introductions with industry experts.

**Submission of Proposal:**

Proposals should include:

* Your understanding of the challenge & proposed method.
* Your evaluation experience and examples of at least three similar assignments.
* Your proposed team.
* an outline workplan with expected deliverables and budget (including time allocation if more than one person is involved).
* a brief overview of your organisations environmental and social activities.
* Submit 2-page CVs for the lead evaluators (in addition to 6-page limit above).

The proposal should be no longer than five sides plus CVs of participating consultants/suppliers.

**Closing date to submit proposals: 22nd July 2024**

**Delivery of final report**: **2nd September 2024**

**Commissioned by:** WWF-UK, Living Planet Centre, Brewery Road, Woking, GU21 4LL.

**Contact person:**

* Name and Designation: Jack Osborne, Partnership Manager, WWF-UK
* E-mail: josborne@wwf.org.uk

**Contracting with WWF-UK:**

It is our requirement that an appointed external partner adopts our standard terms and conditions for engaging with us. These are included within the tender documents. *Please confirm you are willing to accept these terms. Should you have any amends you wish to make, these will need to be discussed with the WWF-UK legal team.*

WWF-UK asks all suppliers to comply with the Supplier Code of Conduct and WWF-UK 3rd Party Expenses Policy. Both documents are enclosed within the tender pack. *Please confirm your acceptance of both.*

All contracted suppliers are required to register on Panda Purchasing (WWF-UK’s PO and invoice system). *Should you be successful in your bid, please confirm you will be willing to register on the system.*

**PART A – REPORT TABLE OF CONTENTS TEMPLATE**

The following provides a basic outline for an evaluation report. While this should be easily applied to evaluations of simpler projects or programmes, adaptation will be needed to ensure reports of more complex programmes (e.g. Country Offices, multi-country regions, eco-regions, Network Initiatives) are well organised, easy to read and navigate, and not too lengthy.

**Title Page**

* Report title, project or programme title, and contract number (if appropriate), Date of report, Authors and their affiliation, Locator map (if appropriate)

**Executive Summary *(between 2 to 4 pages)***

* Principal findings and recommendations, organised by the six core evaluation criteria
* Summary of lessons learned

**Acknowledgements**

**Table of Contents**

**List of Acronyms and Abbreviations**

***Body of the report (no more than 25 pages)***

1. **Introduction (max 3 pages)**

* Concise presentation of the project/programme characteristics
* Purpose, objectives, and intended use of the evaluation (reference and attach the ToR as an annex)
* Evaluation methodology and rationale for approach (reference and attach as annexes the mission itinerary; names of key informants; a list of consulted documents; and any synthesis tables containing project/programme information used in the exercise)
* Composition of the evaluation team, including any specific roles of team members

1. **Project/Programme Overview (max 5 pages)**

* Concise summary of the project or programme’s history, evolution, purpose, objectives, and strategies to achieve conservation goals (attach theory of change including conceptual model, results chain or logical framework and project monitoring system as annexes)
* Essential characteristics: context, underlying rationale, stakeholders and beneficiaries
* Summarise WWF’s main interest in this project or programme

1. **Evaluation Findings (3-5 pages)**

* Findings organised by each of the six core evaluation criteria, including sufficient but concise rationale.
* Tables, graphics, and other figures to help convey key findings

1. **Recommendations (3-5pages)**

* Recommendation organised each of the six core evaluation criteria, including sufficient but concise rationale – recommendations should be specific, actionable and numbered.
* Project/programme performance rating tables to provide a quick summary of performance and to facilitate comparison with other projects/programmes (see the Summary Table Part B, below).

1. **Overall Lessons Learned (max 3 pages)**

* Lessons learned regarding what worked, what didn’t work, and why
* Lessons learned with wider relevance, that can be generalised beyond the project

1. **Conclusions**

* General summation of key findings and recommendations

***PART B - EVALUATION REPORT FINDINGS SUMMARY TABLE***

Evaluators are to assign the project/program a Rating and Score for each criterion as follows:

* **Very Good/4:** The project/program embodies the description of strong performance provided below to a *very good* extent.
* **Good/3:** The project/program embodies the description of strong performance provided below to a *good* extent.
* **Fair/2:** The project/program embodies the description of strong performance provided below to a *fair* extent.
* **Poor/1:** The project/program embodies the description of strong performance provided below to a *poor* extent.
* **N/A:** The criterion was *not assessed* (in the ‘Justification,’ explain why).
* **D/I:** The criterion was considered but *data were insufficient* to assign a rating or score (in the ‘Justification,’ elaborate).
* Evaluators also are to provide a brief justification for the rating and score assigned. Identify most notable strengths to build upon as well as highest priority issues or obstacles to overcome. Note that this table should not be a comprehensive summary of findings and recommendations, but an overview only. A more comprehensive presentation should be captured in the evaluation report and the management response document.

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| **Criterion** | **Description of Strong Performance** | **Evaluator Rating/ Score** | **Evaluator Brief Justification** |
| **Relevance/ Quality of Design** | The project/program design represents a necessary, sufficient, and appropriate approach to achieving changes in key factors necessary to bring about positive changes in conservation targets (i.e., species, ecosystems, ecological processes, including associated ecosystem services supporting human wellbeing). The project/program has rigorously applied key design tools (e.g., the WWF PPMS). |  |  |
| **Efficiency** | Most/all outputs/activities have been delivered. Most/all without delays, with efficient use of human & financial resources, and with strong value for money. Governance and management systems are appropriate, sufficient, and operate efficiently. |  |  |
| **Effectiveness** | Most/all intended outcomes—stated objectives/intermediate results regarding key threats and other factors affecting project/program targets—were attained. There is strong evidence indicating that perceived changes can be attributed wholly or largely to the WWF project or program. |  |  |
| **Impact** | Most/all goals—stated desired changes in the status of species, ecosystems, ecological processes—were realized. Evidence indicates that perceived changes can be attributed wholly or largely to the project or program. |  |  |
| **Sustainability** | Most or all factors for ensuring sustainability of results/impacts are being or have been established as well a scaling up mechanism put in place with risks and assumptions re-assessed and addressed. |  |  |
| **Adaptive Management** | Project/program results (outputs, outcomes, impacts) are qualitatively and quantitatively demonstrated through regular collection and analysis of monitoring data. The project/program team uses these findings, as well as those from related projects/ efforts, to strengthen its work and performance. Learning also is documented and shared for project/program and organizational learning |  |  |