

Invitation to Tender for the Global Equality Project Phase II (GEP II) Final Evaluation

List of Acronyms

GEP	Global Equality Project
CEDAW	Convention on the Elimination of the Discrimination Against Women
CSO	Civil Society Organisations
FCDO	Foreign Commonwealth and Development Office
KT	Kaleidoscope Trust
LGBT+	Lesbian, gay, bisexual, transgender, intersex, and non-binary people
PLS	Post-Legislative Scrutiny
SOGIE	Sexual Orientation, Gender Identity and Expression
TOC	Theory of Change
WFD	Westminster Foundation for Democracy

1. Summary/Background

WFD is looking for an external evaluator to evaluate the Global Equality Project Phase II, implemented by the Westminster Foundation for Democracy (WFD) and Kaleidoscope Trust (KT), which seeks to enhance the efforts of civil society actors and duty bearers to advance gender equality and LGBT+ inclusion.

The programme is funded by the Foreign Commonwealth and Development Office (FCDO) and builds on WFD's and KT's Global Equality Project Phase I (2021-2022) and Commonwealth Equality project (2020-2021). The programme implementation period of GEP II is between August 2022 and March 2023, with the total budget of GBP 869,795.

GEP II works with decision-makers and civic actors across 12 countries and territories¹ to make progress towards advancing gender equality and LGBT+ inclusion. Programme interventions are based on:

- 1) Creating greater evidence, capacities, and incentives among government actors and parliamentarians on the social and economic costs of discriminatory regulations and practices
- 2) Strengthening collaborative relationships between CSOs and political decision-makers and support the flow of reliable information and evidence between them;
- 3) Deepening civil society policy development and policy advocacy capacities with a view to creating a more conducive environment for positive change in laws, policies, and implementation of social norms.

GEP II reports to a Programme Steering Group comprised of WFD and KT representatives as well as to the FCDO via formal reporting mechanisms.

¹ The Caribbean region (Antigua and Barbuda, Grenada, St Lucia, St Vincent and the Grenadines, St Kitts and Nevis,), Mauritius, Namibia, Nigeria, Sri Lanka, Uganda, Tonga)

Countries across Asia, Africa, the Caribbean and Pacific were selected with multiple factors in mind, including acknowledging the limited timescale of the project. Programme interventions have been designed to factor and capitalise upon existing relationships that WFD and KT already had established in targeted countries, and with already existing movements, to progress towards greater equality. Where these factors did not exist, programme interventions have prioritised developing the evidence base to be used by decision-makers and civic actors to make the case for greater equality, targeting countries where ongoing advocacy and legislative reform has been identified or is currently underway.

GEP II has also invested in global products to advance the objectives of the programme and with a view for usage beyond the life cycle of the programme. These include:

- An online e-course, adapting WFD's Post-Legislative Scrutiny (PLS) methodology for CSOs
- Workshops on the application of Post-Legislative Scrutiny (PLS) by civil society organisations in selected countries
- Research on the healthcare accessibility for LGBT+ individuals during the Covid 19 pandemic
- The development of a SOGIE-inclusive CEDAW tracker
- Animations on intersectionality
- Workshops on identifying and working with decision-makers who champion inclusion

2. Evaluation purpose and scope

Purpose: the purpose of this evaluation is primarily to understand the **effectiveness** of GEP in supporting the programme's stakeholders in the main aspects of their work which includes community and network building, capacity building, peer support, advocacy, advisory and research. To help understand the **effectiveness** of the interventions in different country contexts, it will also be necessary to look at the **relevance** of these interventions and how they are contributing to **impact** across these different settings. The evaluation should also consider the **sustainability** of results beyond the end of the programme, and how/if results build upon previous programming work under CEP and GEP phase one.

Audience: the primary audience for the evaluation include the WFD, KT, GEP programme teams, civil society partners and the Foreign Commonwealth and Development Office. Secondary audiences include other WFD programme teams and democracy support actors, and other KT stakeholders.

Scope: the evaluation will cover the entire implementation period of the GEP II programme, August 2022 to March 2023, which builds on the work of the Commonwealth Equality Project (2020-2021) and Global Equality Project (2021-2022).

Objectives: the objectives of this evaluation are to assess the coherence, effectiveness, relevance, impact and sustainability of GEP II² and its relative contribution to results alongside other influencing factors. The evaluation should document and disseminate key findings and recommendations, factors of success and good practice, alongside areas for improvement and opportunities for potential future phases of the programme. Overall, it is expected that the evaluation will deliver:

² See OECD-DAC Evaluation Criteria: [Evaluation Criteria - OECD](#)

- 1) An evidence-based assessment on the extent to which GEP II's theory of change and Results Framework worked as a concept;
- 2) An assessment of the strengths, weaknesses and key results in different contexts to help us understand what progress has been made in seven months, including WFD and KT's (and our partners') contributions to these results
- 3) An analysis of key lessons and deliverables to consider if the steps to achieve outcome and impact have been valid;
- 4) An analysis of the benefits and challenges of identifying entry points (partners, activities, etc.) for working in environments that are considered hostile for LGBT+ rights; and
- 5) An assessment of the cost-effectiveness of the programme.

3. Deliverables

The evaluation is expected to comply with the following timeline:

No.	Deliverables	Deadline
1	Working sessions with the GEP team	TBD
2	Inception Report	10 April 2023
3	Draft Evaluation Report	12 May 2023
4	Final Report	16 June 2023 (TBD)

Expected deliverables are included below:

1. **Inception Report (up to 15 pages, excluding annexes):** summarising the (i) understanding of the evaluation purpose and scope (ii) any proposed adjustments to evaluation objectives and questions, (iii) data collection and analysis plan(s) including draft instruments, (iv) tentative work-plan and schedule for the overall evaluation process, specifying involved stakeholders' roles and moments for communication between the specific stakeholders, (iv) preliminary proposal for the dissemination of findings. It is also expected that the evaluation team will engage the GEP programme team in a participatory exercise to critically interrogate and reconstruct the GEP II theory of change, including an updated version of the theory of change in this inception report.
2. **Draft evaluation report:** this will include assessment findings and draft recommendations. It is expected this report should inform a validation workshop with key stakeholders, as described above.
3. **Final evaluation report:** expected to follow the structure outlined below:
 1. Table of Contents
 2. Abbreviations/acronyms page
 3. Executive summary (maximum 3 pages)
 4. A brief introduction to the programme
 5. The evaluation methodology
 6. Findings
 7. Lessons learned
 8. Summary of recommendations

Annexes must include:

- Terms of reference for the Final Evaluation
- Evaluation schedule/timetable
- List of people interviewed
- Documents consulted and other data

4. Approach and methodology

In view of the evaluation purpose and objectives, the prospective evaluator(s) is expected to suggest an overall approach to the evaluation, the evaluation methodology, the methods of data collection, and the number of data collection rounds.

We expect proposals to include concrete suggestions for the evaluation methodology and request this clearly demonstrates impartiality and lack of bias by relying on a cross-section of information sources and a mixed-methods approach. WFD and KT are open to a wide range of evaluation approaches and methods but expects the evaluation to be grounded in the principles of **theory-based** and **utilisation-focused** evaluation. Regardless of the approach chosen by the evaluation team, the evaluators are expected to demonstrate their understanding of the sensitivities of the type of work which is being carried out, along with recognition of the variety of complex and different environments the programme activities are implemented in and with that in mind foster participation at key stages of the evaluation, seeking advice and support. This includes:

- 1) During the inception phase, when designing evaluation tools – the evaluator(s) should reach a shared understanding of the evaluation objectives and questions with WFD and KT and refine the evaluation methodology accordingly;
- 2) During data analysis – the evaluator(s) will consult with WFD and KT to encourage the validity of findings and relevance of results and recommendations, whilst also taking into account the programme's communications needs;

Importantly, the external evaluator or team is expected to work in partnership with WFD and KT to maximise the transparency and utility of the evaluation process and products. It is therefore expected that the evaluator(s) facilitate an in-person/virtual validation workshop to discuss initial findings and recommendations with the programme teams at WFD and KT prior to producing the final report. All programme related documents, including programme proposal documents, programme reports, GEP I evaluation report and programme implementation details will be provided to evaluator(s) upon their selection.

5. Evaluation questions

As stated above, the evaluation aims to assess the **effectiveness, coherence, relevance, impact** and **sustainability** of GEP II and its relative contribution to results alongside other influencing factors. This includes:

- The relevance of GEP II vis-à-vis contextual and beneficiary needs
- The effectiveness of GEP II in contributing to overall programme objectives
- The overall impact of the GEP II programme
- The sustainability of results of the GEP II programme
- The cost effectiveness of the GEP II programme

Proposals are expected to include a list of draft evaluation questions that will be refined during the inception stage of the evaluation.

6. Ethical considerations and risk mitigation

The evaluator is expected to comply with evaluation standards, including ethics, throughout the evaluation process, as set out in the OECD/DAC Quality Standards for Development Evaluation (<http://www.oecd.org/dac/evaluation/qualitystandards.pdf>).

Proposals are expected to outline their approach to potential risks and potential mitigation strategies by adapting the following table:

Risk	Risk level	Mitigation strategy	Residual risk level
	(High/ Medium/ Low)		(High/ Medium/ Low)

Particular attention should be paid to the confidentiality of sensitive data, safeguarding measures and engagement with WFD, KT and the programme team.

Proposals are expected to outline quality assurance measures and how these will be integrated into the evaluation. It is recommended that the evaluator(s) nominate a Quality Assurer and outline their role in the evaluation clearly.

7. Bid process

Below is the proposed timescale for the tendering process. Please note the dates are indicative and subject to change.

Description	Date
Issue ITT	21 th February 2023
Closing date for receipt of completed tender proposals	7 th March 2023
Interviews	14-15 th March 2023
WFD announces preferred supplier	17 th March
Contract finalised and signed	24 th March
Commencement of the evaluation	27 th March

8. Bid requirements

WFD's standard terms and conditions for tendering and key policies are found at [Policies | Westminster Foundation for Democracy \(wfd.org\)](#) and you can find a copy of WFD's Code of Conduct at [Code of Conduct | Westminster Foundation for Democracy \(wfd.org\)](#).

Please submit the following documents electronically and addressed to Andrew Teye, GEP Programme Manager, at andrew.teye@wfd.org by **March 7, 2023**. The same email address should be used for any questions related to this invitation to tender.

- A narrative proposal, outlining proposed methodology and project plan for the evaluation. Proposals should include the following sections:
 - a. Executive summary;
 - b. Introduction: setting out the evaluators' understanding of what is being evaluated and why, as well as clearly identifying any departure from the terms of reference;
 - c. Approach and methodology: presenting proposed evaluation questions and showing how they could be answered by way of proposed methods, proposed sources of data, and data collection procedures. This should be mindful of COVID-19 restrictions and collection of data within these restrictions as well as the project timeframe of seven months of interventions. The proposal should include a schedule of tasks and activities.
 - d. Risks, ethics and quality assurance: this should clearly identify potential ethical and practical risks to the evaluation and propose mitigations. This section should also detail how the evaluation will integrate a sufficient level of quality assurance.
 - e. Qualifications and competence of the team and/or organisation: the evaluation is expected to clearly nominate a Team Leader and, if including other roles, should describe how the roles and experience of the team are relevant to this assignment.
- A financial proposal with a full breakdown of costings for the proposed evaluation including separate accounting of VAT and/or any other applicable tax, duty or charge. It should also detail any discount applied in view of WFD's not-for-profit status. Financial proposals should include a breakdown that specifies tasks lines for each team member(s), with estimates of the number of days per team member, their individual day rate(s) and travel costs (if applicable).
- References. Please include details of two references relating to similar services provided in the past three years. Please note – referees will only be contacted once Preferred Bidder status is assigned.
- Curriculum vitae for the consultant(s), and your organisational profile if relevant, highlighting previous evaluation experience and essential criteria outlined above. CVs should not be longer than three pages.
- Confirmation of acceptance of General Terms and Conditions of Tendering. By submitting a bid, you confirm acceptance to WFD's General Terms and Conditions for Tendering which can be found on our website [WFD, General Terms and Conditions for Tendering | Westminster Foundation for Democracy](#). All bids should include a signed copy of the Confirmation of Compliance form.

All bidders should also note the following:

- this ITT and the response may be incorporated in whole or in part into the final contract;
- only information provided in response to questions set out in this documentation will be taken into consideration for the purposes of evaluating the ITT;

- bids which are poorly organised or poorly written, such that evaluation and comparison with other submissions is notably difficult, may exclude the bidder from further consideration; and
- any bids which do not fully comply with the requirements of this ITT may be disregarded at the absolute discretion of WFD.
- The proposal should not exceed 10 pages (excluding introductory pages, executive summary and annexes) and may be shorter.

9. Fee Structure

25% of total fee payable upon contract signature, 25% upon submission of the inception report and 50% of fee payable upon submission of the final report and invoices.

Maximum budget available for this evaluation: £20,000 (inclusive of taxes)

10. Personnel requirements

The evaluator(s) shall have the following expertise and qualification:

- The Team Leader or Lead Consultant must have led a minimum of 2 similar evaluations before, similar in size, complexity and thematic area. It is expected they have over 10 years' experience in the field of evaluation within international development, including experience working with international organisations and donors, evaluating projects with multiple partners with complex implementation modalities.
- The Team Leader or Lead Consultant should have at least a Master's degree in a relevant field (e.g. Public Policy, International Development, Development Economics/Planning, Economics, International Relations/ Diplomacy). Where this is not met, WFD may accept a sufficient level of professional experience in alternative.
- The evaluator(s) should possess extensive expertise, knowledge, and experience in the field of aid effectiveness and aid management process related issues, including governance programmes;
- All evaluator(s) should have strong experience of project formulation and evaluation; At least 10 years of experience in working with international organisations and donors, evaluating projects with multiple partners with complex implementation modalities;
- Excellent written and verbal Communication skills in English;
- Offers will be evaluated on these criteria as well as the quality of the technical offer (proposed methodology, capacity to mobilise qualified personnel, risk mitigation and consideration of COVID-19 restrictions, etc.) and the soundness of the financial offer.
- It would be desirable for the evaluator(s) to demonstrate expertise in inclusion and equality issues.

11. Equal Information

Should any supplier raise a question that is of general interest, WFD reserves the right to circulate both question and answer to other respondents, either via WFD's website or by email. In this event, anonymity will be maintained.

12. Bid evaluation criteria

WFD does not provide a mathematical formula by which bids will be evaluated, but the procurement committee will usually consider the following criteria, among others in the evaluation of all responses:

- ✓ Quality of bid document
- ✓ Service offer and solution fit to specification
- ✓ Quality, capacity, and track-record of bidders based on references
- ✓ Value for money and pricing factors
- ✓ Professional profile, track record, and references
- ✓ Relevant experience, including case studies

WFD will score each criterion using the following table:

0	The proposal submitted omits and fundamentally fails to meet WFD's scope and specifications. Insufficient evidence to support the proposal to allow WFD to evaluate. Not Answered
1	The information submitted has a severe lack of evidence to demonstrate that WFD's scope and specifications can be met. Significant omissions, serious and/or many concerns. Poor
2	The information submitted has some minor omissions in respect of WFD's scope and specifications. The tender satisfies the basic requirements in some respects but is unsatisfactory in other respects and raises some concerns. Satisfactory.
3	The information submitted provides some good evidence to meet the WFD's scope and specifications and is satisfactory in most respects and there are few concerns. Good.
4	The information submitted provides good evidence that all of WFD's scope and specification can be met. Full and robust response, any concerns are addressed so that the proposal gives confidence. Very Good.
5	The information submitted provides strong evidence that all of WFD's scope and specification can be met and the proposal exceeds expectation i.e. exemplary in the industry. Provides full confidence and no concerns. Outstanding