

WWF (UK funded) Organisational Development (OD) Portfolio Evaluation

BACKGROUND

From around 2014, WWF-UK developed a portfolio of OD funding for specific WWF offices where WWF-UK was focusing conservation investments. This timing corresponded with the WWF “Truly Global” approach to progressing equity across all WWF offices in terms of capacity and voice. Initially the WWF-UK OD programme aimed to finance other WWF offices to meet the objectives of the Truly Global approach. This OD Portfolio was reviewed as a portfolio in 2017 – exploring WWF UK support, Theory of Change (TOC) and approach, with WWF India, Brazil and Kenya also choosing to conduct reviews of their own OD country programmes. This led to a refresh of the programme in 2017 and a further refresh in 2020 when the maturing offices developed their own country strategies to deliver against objectives that they had set. The OD portfolio has, in some cases, also evolved into Strategic Partnerships and Partnership Agreements, while continuing to be managed by Managers, in WWF-UK's Conservation Programmes Team.

From an accountability perspective and as a WWF Network standard it is timely to conduct a review process this financial year to gather information about what has, and has not, been achieved against initial plans. It is also helpful in generating shared learning and insight, as well as informing the Network's OD community of practice. The review approach will model the strategic partnership principles, to ensure value for each WWF office involved and usefulness for future OD funded offices. From the WWF UK perspective, outputs of the review must support the development of WWF UK's OD strategic objective as a sub-set of the wider strategy.

WWF-UK has over the past two years invested around £2.5 million in OD support for WWF offices in Brazil, China, India, Kenya and Colombia. An investment of a further ~£1.6 million is planned over the coming 3 years.

In order to run an evaluation across a portfolio of OD programmes in different continents, it was agreed that an external facilitator / evaluator need be recruited to support the delivery of the following approach.

OD EVALUATION: SUMMARY OF PROPOSED APPROACH

- **Purpose**

- a. Identify achievements, assess relevance & progress
- b. Review context, adapt to new realities / reality check the program
- c. Confirm and/ or adapt ToC and agreed roadmap
- d. Identify lessons / best practices for organizational and network learning
- e. To assess if OD investments have an added value, different to that of programmatic grants

- **Potential Process**

- a. **Preliminary Office Discussions:** WWF-UK and all partner OD offices have already held discussions about a proposed evaluation, agreeing the framing for this TOR and the role of an external facilitator in that evaluation: **COMPLETED**
- b. **Steering Group:** Finalise Call for Proposals by consultants, appoint and agree terms with an external facilitator: **MEMBERSHIP AGREED** (WWF's Brazil, India and UK offices)

To be led by external facilitator:

- c. **Document review:** Review of reports and related OD documentation pertaining to each office
- d. **Methodology (proposed):**
 - Develop and ratify a core self-assessment questionnaire/survey for adaptation to each office circumstances - or similar;
 - Develop a reporting template/format that will enable cross-learning between the offices.
 - Enable / facilitate each OD office to undertake a self-assessment (or similar) to assess, eg:
 - Progress toward achieving OD strategy by testing the country / portfolio level TOCs focussing on the past 3 financial years i.e. FY19-FY22, but not limited by this),
 - Delivery against OD workplans and budgets FY19-FY22
 - Strengths and weaknesses of the office with regard to OD,
 - Response to and integration of Environmental & Social Safeguards and risk management into office approaches, into OD,
 - How resilient offices have been through external challenges, such as the covid-19 pandemic and shrinking civil society space
 - Priorities for the next 3 years including challenges and opportunities
 - An in-depth identification and documentation of 3 – 5 key lessons &/or case studies, as possible
 - A consideration of other partnership approach options, e.g., Partnership Agreement, bulk grants, etc.
 - We assume OD helps deliver better conservation, what evidence do we have for this?
 - The added value of the OD portfolio TO the donor offices, and added value FROM donor offices
 - Identification of which KPIs work as evidence of OD progress
 - And, less or other as related to the needs of the different offices

- Run a facilitated Office level learning workshop
- Facilitate peer review processes of each other's self-assessments
- Run a virtual partnership workshop for the 6 partner offices, with invited observers from "new OD partnering nations" and others as suggested by the group.
- Document findings, learning and recommendations for each office involved and for the portfolio.

External Facilitator: roles and responsibilities

Someone who has demonstrated expertise to:

- OD expertise across a wide range of geographies and approaches
- Both work under own initiative AND in coordination with the Steering Group AND with a cultural understanding across all the different offices involved.
- Remotely facilitate and coordinate meetings in all time zones;
- Support the development, running and analysis of a self-assessment (or similar);
- Draft initial documentation, (including any case studies depending on resources and need)
- Provide expert insight into findings and recommendations;
- Collate cross-programmatic summary for sharing within wider WWF Network;
- Liaise with WWF Germany, who are undertaking their own evaluation of their OD support to a different set of offices (under BMZ funding);
- Compile a report of findings, learning and recommendation for presentation in an accessible style suitable for each office AND for the portfolio to give clarity of direction for the coming 3 years and beyond.

General Principles

- Each country evaluation to be bespoke and reflect the needs of the country, e.g. the status of their strategy process.
- Each country evaluation will have elements of a 'stock-taking' (how we are doing against plans?) and a forward looking (what can we do better?) element.
- Where there has been multi-party investment in OD, a broader range of stakeholders should participate as appropriate.
- Addressing cross cutting questions to identify lessons and enable mutual learning as agreed in planning meeting.
- Findings documented using agreed reporting template; validated internally and shared with peer review group.
- The approach will be designed using the Strategic Partnership Principles. These are:
 - Shared strategic goals
 - Shared risks
 - Mutual accountability
 - Mutual understanding and trust
 - Equity
 - Safeguarding

Shared Lessons

- e. Interactively shared with the OD Community of Practice and other interested parties, as relevant and agreed by the group
- f. Incorporated into WWF UK's related work, going forward

6. DELIVERABLES – to be agreed and adapted per office context

- Validated assessment approach
- Validated OD strategies / OD plans (per country)
- Validated ToC / Outcomes Framework / KPIs / Monitoring plans
- Feedback & recommendations (in-country and programme level)
- Case studies (as mutually identified)
- Draft report and discussion with WWF-UK stakeholders of its recommendations
- Final Report

DRAFT PHASES (suggested)

Phase	Phase 1	Phase 2	Phase 3	Phase 4
Purpose	Agreement of rationale, TOR, consultant appointment	In country self-assessment conducted (TBC)	Peer review, feedback process conducted and partnership workshop	Finalisation of country documentation
Output	All party agreement	The self-assessment for each country	Peer review feedback Workshop key points and findings	Review reports Lessons learned Sharing of findings
Process	Internal & Zoom Meetings	Participatory, country led by facilitator	Participatory, country led by facilitator	Country led by facilitator
Completion (indicative)	Early April 2022	May	June	July

The expectation is that this consultancy would be a **maximum of 25 days of work**, spread across 4 months, working the hours as defined in your proposal and developed into an agreed contract. Consultants are welcome to propose work as a small team, or as individuals

PROPOSALS:

All interested consultants are requested to send to Jamie Gordon (igordon@wwf.org.uk) by COB Sunday 6th March the following:

- A narrative laying out how you would respond to this call for proposals, documenting, in the light of your understanding of portfolio functioning and WWF's work: your methodology and response to the complexities of facilitating long distance and cross-national discussions without travel (no more than 2 pages of A4 (normal margins and font));
- Your proposed Gantt chart with clarity of start date and actions in time frames to enable you to submit a proposed budget based on days worked, your daily rate(s) and your roles if applying as a team;
- Adapted CV(s) of consultant(s) to focus on experience in facilitation of processes similar to this, OD experience, international experience and evaluation/formal report development.

PROCESS:

- The Steering Group will assess and score the proposals, to create a short list to interview;
- Interviewees will be asked to supply a copy of an evaluation report that as closely as possible corresponds to this type of consultancy;
- Interviews may involve a presentation to the interviewers;
- Selection, agreement of T&C, contracting, briefing;
- Undertake consultancy, with regular check in moments with Steering Group representatives.