



Terms of Reference

Project Title: End of ARTICLE 19's strategy (Expression Agenda) 2016-2021 evaluation

Project Manager: George Morris, Senior Monitoring and Evaluation Officer

Accountable: Inger Wong, Head of Projects

Senior Management Sponsor: Quinn McKew, Executive Director

1. Introduction

[ARTICLE 19](#) is a global organisation promoting and defending freedom of expression and information. The realisation of our vision and mission is underpinned not only by freedom of expression and information, but through other rights including belief, privacy, participation, assembly and association, and non-discrimination. With offices in the UK, USA, Bangladesh, Brazil, Cambodia, Kenya, Mexico, Senegal, Thailand, and Tunisia, and approximately 200 staff as well as collaborating partners, we strengthen national and international civil society capacities to influence powerholders on the protection of FOE and FOI and build or reform institutions and policies.

ARTICLE 19's overarching strategy is called the Expression Agenda (XpA), which aims to guide interventions globally between 2016 – 2021. This multifaceted strategy comprises global impacts, outcomes and regional outcomes. These are disbursed over five themes related to freedom of expression: Civic Space, Digital, Media, Protection and Transparency. Coinciding with the XpA Agenda is ARTICLE 19's gender strategy, called "The Mx Method" which cross-cuts the XpA's five thematic pillars.

The XpA is used as a framework for most of our core grants, most notably [Sida](#), who supports all areas of ARTICLE 19's work. It also underpins the design and development of restricted grants that fund work in our regional offices as well. It is therefore the key driver for all our work globally. The latest international results framework can be found in **Annex A** of this ToR. It should be noted that this framework has had two adaptations since its initial development in 2016.

2. Scope and Focus of the evaluation:

This evaluation will have a predominantly *summative focus* and will be the primary vehicle to hold ARTICLE 19 accountable to itself and a range of donors and stakeholders. The strategy is large, spanning multiple themes and global regions, so while we do ask the evaluator to assess global impact, the primary focus will be on identifying best practices, lessons and challenges related to implementing the XpA.

Furthermore, ARTICLE 19 will begin developing a new organisation-wide strategy in early 2021. For this reason, conclusions and recommendations should be articulated in a way that can contribute to our future strategic thinking.

The evaluation should also take into account the voices of the communities we serve and issues surrounding gender and diversity within the countries and spaces we operate, alongside key stakeholders in multi-national fora and partner organisations. Specifically, we will ask the successful evaluator to:

- **Assess our progress towards global impact of our international strategy:** We would like the evaluator to identify significant global impacts achieved at the international, regional and national levels, as well as identifying significant gaps. This assessment should be completed with reference to the framework in Annex A. *Note ARTICLE 19 will provide internal reviews, donor reporting and logistical support for this.*
- **Contributions of ARTICLE 19's regional offices and teams:** XpA's Global Outcomes are driven not only by the international framework, but also through regional outcomes outlined in seven regional strategies. The consultant will be asked to review contributions from regions. *Note, ARTICLE 19 will provide logistical support in acquiring documentation and interview informants from the regional teams.*
- **Lessons learned and failures:** The focus of this section concerns learning lessons on what has affected delivery of our strategy and its impacts and if and how ARTICLE has adapted. We would like the evaluator to identify lessons to help us understand what has and has not worked to guide future ARTICLE 19 strategic planning. As part of this, we would like the consultant to assess the degree to which our strategic framework and project management processes supported delivery of results/external impact.
- **Core evaluation questions:**

PART A – Results:

- 1) Impact:
 - a. What were the most significant impacts achieved through XpA over the past five years regionally and globally, what were the gaps in the impact, and what do they tell us about XpA's performance?
 - b. Were there any unintended or negative outcomes from XpA, and why did they occur?
 - c. How well have we succeeded in fostering partnerships in countries, regions, institutions and spaces in which we work?
 - d. How well have we ensured diversity and inclusivity in our efforts to deliver XpA both externally and within our offices?
- 2) Relevance: How relevant has the XpA been to the communities we serve, partners, and to ARTICLE 19's international and regional staff?
- 3) Effectiveness: Can best practices in implementing XpA be identified? Can poor practices be identified and how could we do better next time?
- 4) Sustainability: To what extent are results sustainable in the long term?

PART B – Learning:

- 1) Considering the above, what key lessons can ARTICLE 19 learn to improve our future long-term strategies?

3. Main stakeholders for this review:

As a cross-cutting strategy, the evaluator is expected to interview a wide range of internal staff in both regional and international offices. Externally, we will also ask the evaluator to engage key donors, partner organisations and other key stakeholders (such as UN Special Rapporteurs) to ensure their perspectives are included. We will also ask the evaluator to engage with people from the communities we serve to ensure their voices form part of this evaluation.

4. **Methodology:** A brief explanation of the consultant's methodology should be mapped out in the proposal but should consider the following:
 - The evaluation should include both Key Informant Interviews and a document review sufficient to answer core questions in section 2
 - Given the wide array of actors engaged with ARTICLE 19, the methodology should include a strong emphasis on assessing contributions to outcomes/impacts observed at international and national fora

- Ensure, along with key stakeholders and partners, that community voices are included whilst respecting the 'do no harm' principle
- Ensure that issues surrounding ARTICLE 19's gender strategy, the Mx Method, are included as well as to what extent strategy has been integrated into regional offices
- Flexible methods of ICT and remote data collection to increase remote participation

5. Minimum requirements for an evaluator(s):

- Extensive experience of conducting evaluations of a similar type including programmes implemented by international organisations, whose scope includes engaging stakeholders at a range of international institutions/bodies
- Experience of working within the human rights, civil society, advocacy and/or policy change arenas
- Good understanding of more than one of ARTICLE 19's five themes – Civic Space, Digital Human Rights, Media Freedom, Protection and Transparency
- Good understanding of evaluating gender-mainstreaming
- Fluent in written and spoken English.

Other desirable skills

- Online facilitation experience
- Knowledge of complex, multi-country grant arrangements in INGOs
- Experience of working in one or more ARTICLE 19 target countries
- Fluent in either Arabic, French, Spanish, or Portuguese

The consultant(s) must provide an up-to-date CV, and at least two recent references.

6. Timeframe, planning and budget

Management structure: The consultant will be managed by an advisory panel, that will include ARTICLE 19's Senior monitoring, evaluation and learning officer, who will also provide logistical support.

The evaluation period will be between late October 2020 and February 2021, with a final version of the evaluation report completed no later than March 1st 2021. The consultant is expected to plan the number of days worked on the evaluation during those times with the Senior Monitoring and Evaluation and Learning Officer. However, we ask the consultant to be available for a debriefing session following submission of the final report.

As part of the proposal, the evaluator is asked to provide a budget including the estimated time needed and hour/day rate and other expected expenses. Budget available for the evaluation is a maximum of £20,000 (including VAT).

Interested applicants should send their expression of interest and budget to George Morris, Senior Monitoring, Evaluation and Learning Officer (george@article19.org) by 15th October 2020.

7. Deliverables

Inception report: Once awarded, the consultant will provide an inception report within two weeks outlining the scope of work, and intended work plan. It should detail how each evaluation question will be answered by way of proposed method, proposed sources of data and data collection procedures. The inception report will include a proposed schedule of tasks, activities and deliverables which will be discussed and agreed upon by ARTICLE 19

Draft evaluation report: The draft report should be produced in English and provide initial findings and recommendations. ARTICLE 19 will provide comments within 10 working days of receiving the report

Final evaluation report: The final report is to be presented in English and delivered 10 working days after receiving comments from ARTICLE 19. The report should not exceed 45 pages, excluding annexes, and be presented in Calibri Font 12.

The structure can be adapted from what is set out below in consultation with the Senior Monitoring, Evaluation and Learning Officer but must include findings, analysis, conclusion and recommendations.





- *Executive summary (1-2 pages):* This should summarise the main findings and recommendations in a concise manner.
- *Introduction:* The first part should describe the background and context as a basis for the analytical and evaluative sections that follow. The introduction includes a short explanation of the purpose and objective(s) and the evaluation methodology
- *Analysis and major findings:* This section focuses on the findings related to the core evaluation questions. The section not only lists the findings, but also contains a situational analysis of the evaluator regarding these findings
- *Conclusions.* The conclusions follow logically from the main findings and the analysis but are clearly distinguishable from these. The conclusions should provide answers to the main evaluation questions. Please use the table below for the assessment of the different criteria.
- *Recommendations and lessons learned.* The recommendations follow logically from the conclusions. They should be actionable and prioritised to help develop ARTICLE 19’s work, and include an analysis of opportunities that can guide future strategy development.
- *Annexes*
 - Terms of reference
 - List of organisations and persons interviewed and documents reviewed

Table: Impact and Global outcome review rating¹

Please use the following table for scoring performance in terms of relevance, effectiveness, etc.

Criteria	Scoring*	Explanation/Comments
Impact		
Relevance		
Effectiveness		
Efficiency		
Sustainability		

* Scoring:

-  Highly Successful
-  Successful
-  Partially Successful
-  Unsuccessful

Debriefing session: The consultant is required to schedule a debriefing session to discuss findings with ARTICLE 19. It is desirable for any knowledge and lessons learned from conducting an evaluation to be shared organization wide, and an all staff meeting should be conducted at the international office. The debriefing session should take place within 30 days of the report’s submission.

¹ Scoring should adhere to the OECD [DAC evaluation](#) criteria (updated 2019)

8: Additional notes:

COVID 19: The current pandemic means the consultant is expected to conduct deliverables remotely, making use of online communication and data gathering tools where applicable.

Management Response: Evaluators should be aware that it is ARTICLE 19's policy to draft a management response to all evaluations undertaken on its projects. This will take place within 60 days of its submission.

Transparency: It is ARTICLE 19's policy that external evaluations contribute to its aims of becoming a transparent and accountable organisation. Evaluation reports will be published on its website and will be shared with external stakeholders unless there are clear security risks with doing so.

DAC evaluation quality standards: The evaluation shall conform to OECD/DAC's Quality Standards for Development Evaluation and the evaluators should specify how quality assurance, in accordance with DAC's quality standards, shall be handled by them during the evaluation process. The evaluator shall use the Sida OECD/DAC [Glossary of Key terms](#) in the Evaluation.

Annexes:

ANNEX A: Global Outcomes and Impact framework: Please see accompanying pdf file. The global outcomes and impacts therein drive our work. It should be noted that there are regional variants of these in each of our country offices that will need to be incorporated into this review.