## TERMS OF REFERENCE – EVALUATION OF UK CLIMATE STORY LAB

### 1. Overview

The Children’s Investment Fund Foundation (CIFF), in partnership with Doc Society, is looking for a consultant to lead a rapid evaluation of the UK Climate Story Lab and to develop a monitoring and evaluation framework for storytelling projects.

The consultancy is expected to take place from **February 2020 to November 2020**, with an application deadline of **31st January 2020**.

### 2. Background

CIFF is an independent philanthropic organisation, with offices in Addis Ababa, Beijing, London, Nairobi and New Delhi. Established in 2003, CIFF works with a wide range of partners seeking to transform the lives of children and adolescents across the world. CIFF’s areas of work include maternal and child health, adolescent sexual health, nutrition, education and income generation, child protection and supporting smart ways to slow down and stop climate change.

CIFF-funded programmes place significant emphasis on quality data and evidence. Before making an investment and during implementation, CIFF works with partners to measure and evaluate progress to achieve large scale and sustainable impact. For more information, please visit: [www.ciff.org](http://www.ciff.org).

**Doc Society** are a non-profit founded in 2005 committed to enabling great documentary films and connecting them to audiences globally. Based in London and New York they work with filmmakers and partners all over the world. Doc Society bring people together to unleash the transformational power of documentary film, standing in solidarity with filmmakers and working to unite them with new friends and allies, building new models globally. They aim to innovate, share and innovate again. For more information, please visit: [https://docsociety.org/](https://docsociety.org/)

Facts alone cannot shift public opinion or create demand for climate action. Individuals also need an emotional motivation to act, which may range from anger to awe. Strategic cultural interventions that link creative storytelling with climate campaigners have the power to change attitudes around the climate emergency, trigger key audiences to take action and demand progress from decisionmakers, and ensure climate becomes and remains a political priority. This audience mobilisation is especially needed over the next 10 months in the run up to 2020 UN Climate Change Conference (COP26) hosted in the UK.

This investment will test whether a Climate Story Lab in the UK can effectively strengthen connections between expert storytellers and climate campaigners, and identify and develop promising ideas for new creative audio-visual storytelling projects (e.g. music, art installations, documentaries, podcasts, AR/VR immersive media, etc) integrated with impact campaigns to educate, engage, and motivate strategic audiences in the UK, e.g. the centre-right, black, minority ethnic communities, unactivated allies as well as the climate activist base. Designing creative content in line with robust audience insights and segmentation is critical for the impact of storytelling. The final target audiences will depend on the projects we decide to support with catalytic seed funding, but in the first instance are likely to focus on activating the existing pro-climate base.

This investment is a proof-of-concept for CIFF’s developing strategy of investing in arts and culture as a lever of change.
The Climate Story Lab (9-13 March 2020)
The Lab will bring together creative storytellers with experts from political communications, polling, climate science, psychology, digital strategy and philanthropy, as well as activists and movement leaders. Doc Society will solicit potential climate storytelling projects, and invite the creative teams from the most promising projects to participate in the four-day Lab. During the Lab, the participants will receive advice on the creative execution of their project and how to work with existing campaigners and political strategists to maximize the impact of their projects on key audiences. Together the participants will:

1. Test their assumptions about the role and potential impact of climate storytelling in the current political and social environment;
2. Explore what they know and need to learn about their target audiences—and those they may be overlooking;
3. Share and disseminate learnings from past successes and failures;
4. Collaborate to reimagine the practice of climate communications.

A pilot Lab took place over four days in July in New York, with over 110 participants drawn from the diverse sectors described above, working together on 12 new storytelling projects that will reach and engage diverse US audiences. The projects were selected from >100 submissions, and included the official documentary about Greta Thunberg, following her from her very first climate strike to her sea journey to the UN General Assembly in September (a project CIFF is now considering for specific funding). CIFF attended but did not fund the pilot lab.

If successful, the Climate Story Lab will result in a number of thoroughly workshopped creative storytelling interventions, with respective integrated plans for impact campaigns. CIFF’s investment will provide catalytic seed funding for 2-3 projects. How that funding is used will depend on the projects supported but will likely involve post-production funding and will, in all instances, contribute to the execution of associated impact campaigns.

3. Purpose & Scope

We are looking for a consultant available to start immediately to help CIFF and Doc Society assess the impact of this investment by providing:

a) An independent review of the outcomes of the UK Climate Story Lab itself. Key metrics of success that we have initially identified include (consultants are free to expand/revise these metrics in their proposal):
   - **Capacity building.** % of participants who positively assess value of the Lab in increasing their knowledge and building connections
   - **Coalitions.** # of new partnerships between creatives and climate campaigners, as a consequence of the lab.
   - **Shared vision.** # of new impact strategies developed and implemented as a consequence of the lab.
   - **Quality projects.** # new storytelling projects workshopped in the UK Lab, and out of those, % that secure funding.
   - **Awareness.** # of downloads and shares of the Lab report.

b) Develop an evaluation framework for the 2-3 storytelling projects selected through the Lab.
At outcome level, the investment as a whole (including catalytic seed funding) can contribute to changing behaviours among key audiences necessary for building political pressure, changing the media narrative, and eventually contribute to changing the legal & political structures
necessary for the climate action required to meet 1.5 degrees target. The specific indicators for these outcomes will have to be developed once the storytelling projects are selected through the Lab, as they will need to reflect each individual campaign objective, the intended target audiences and each geography. Such metrics could include:

- **Increased awareness.** Making the project-specific issue or campaign a live political question and key issue in strategic territories.
- **Attitudinal and behaviour shift.** Triggering positive behaviour change amongst strategic audiences.
- **Policy change.** Providing powerful influencing opportunities with decision-makers and CEOs to help prioritise climate-positive policy or decision-making.
- **Increased coordination.** Offer powerful narrative tools to help the climate movement organise, create coalitions, and drive funding.
- **Increased number of climate actions.** Galvanising new community-led activism.

All supported projects will also need to have more output-focused metrics, including:

- Number of projects that are fully developed
- Viewing/reach figures of above projects (through offline and online analytics)
- % of storytelling projects that have audience segments identified
- % of storytelling projects that have specific strategies developed to reach target audience(s).

4. **Methodology & Work Plan**

To achieve both objectives, considerable attention must be given to the M&E work developed by Doc Society and to ensure that these M&E activities are complementary rather than duplicative. Please read the [Doc Society Impact Field Guide](#) for more information.

Suitable impact evaluation methodologies may include: outcome mapping, Qualitative Impact Assessment Protocol, Most Significant Change, contribution analysis, Rapid Impact Evaluation, etc. Consultants are encouraged to propose a suitable methodology that is responsive to both the evaluation needs for this assignment and the resources available.

We expect the following M&E activities will be needed:

For the evaluation:

- Identify and reach consensus from all partners involved on the outcomes of interest and key indicators needed to evaluate the Lab.
- Develop data collection tools and collect primary data from participants of the Lab either during or after the workshop week (9-13 March), as well as other program stakeholders. This may include short online surveys or key informant interviews. To note that Doc Society will be collecting a range of monitoring data as well, so the evaluative tools must be complementary.
- Pull together and analyse secondary data on the outcomes of interest for the Story Lab, including all monitoring data from the Doc Society.
- Develop an evaluation scorecard/rubric for assessing the storytelling projects workedshopped during the Lab.
4

• Present an independent review of the Lab activities and outcomes, including recommendations for future Labs (in the form of a report and presentation/workshop).

For the M&E framework development:
• Develop, test and revise the 2-3 storytelling projects’ theory of change, identifying risks and assumptions for each step of the causal chain.
• Based on the theory of change, identify key performance indicators for each level of result (output, outcome, impact). This monitoring framework should include at minimum: definitions, targets, data sources, frequency of data collection, responsibilities.
• Suggest methods for operationalising the framework and recommend ways forward (including resources needed).
• Produce a Cascade to Impact for the projects, which CIFF can use for future investments (more information about this tool will be provided to the selected applicant, but for a brief introduction please have a look at the video here).

Interested applicants should submit a short illustrative methodology and work plan to achieve the above objectives, which will be used to assess proposals. The contracted consultant will then develop a detailed methodology and work plan within the first month of the assignment, in consultation with CIFF and grantees.

5. Deliverables & Tentative Timeline

The tentative timeline for this assignment is between February - November 2020. Key deliverables identified for this assignment include:

1. Evaluation report on the outcomes of the Climate Story Lab (March/April 2020) and recommendations
2. Impact evaluation framework for each story telling project (June 2020)
3. Final M&E report – to include any updates to the evaluation and the final frameworks, as well as recommendations (November 2020)

We encourage evaluators to opt for concise reports and, where possible, visualisations of insights as part of their deliverables. Additional dissemination products (factsheets, presentations, webinars, etc.) may be proposed by applicants.

6. Qualifications & Experience

Competencies and experience include:
1. Proven track record of evaluating storytelling projects, documentaries, or communication campaigns.
2. Proven track of monitoring and evaluation methods that verify knowledge/awareness levels and behaviour change.
3. Preferable thematic expertise in climate change mitigation programmes or advocacy. Solid understanding of the current challenges for climate action and the political ecosystem defining climate ambition (NDCs, COP, etc).
4. Experience developing monitoring and evaluation frameworks for social and behaviour change communication investments.
5. Experience in using mixed methods for evaluation.

7. Budget

Proposed budgets will be reviewed with respect to the suitability of the work plan and activities for delivering deliverables in a cost-effective manner. A cap of $25,000 (inclusive of VAT) has been earmarked for this exercise.

8. Application Procedures

Please note that all personal data and application materials provided by applicants will be used in accordance with applicable UK privacy regulations in the UK, and all records will be deleted after the application process, unless applicants specifically mention that they agree for their applications to be held by CIFF for potential evaluation work in the future.
Applicants should further note the TOR specification in Annex 1 of the TOR.

The anticipated deadline of the submission of the short proposals is 31st January 2020.

CIFF understands that background information is limited for a detailed proposal, and therefore request proposals to be limited to 8 pages or less to highlight the consultant/s relevant experience and illustrate how they will approach and budget an exercise to achieve the above stated objectives within the timeframe and given budget. The full proposal should include two components:

1) A technical proposal that does not exceed 8 pages, consisting of the proposed methodology, work plan, and highlight of individual or team members’ relevant background.

2) An illustrative budget (per provided template) that itemizes costs in USD for the proposed work plan and given timeline. The financial proposal should clearly itemize the budget necessary for different work streams, and clearly state the cost of key personnel in daily rates. Please review CIFF’s overhead policy in Annex 2 of this TOR. Please include VAT if applicable.

3) Annex:
   - CVs for each key team member/s who will be working on the assignment; 2-page limit per CV.
   - References: At least three relevant references and contact information
   - At least one example of a work product most relevant to those identified for this assignment.

Proposals should be professionally presented, submitted electronically via email in Microsoft Office format, in English, with font no smaller than 11 point. Where documents are embedded within other documents, please provide separate electronic copies of these embedded documents.

Applicants should submit only such information as is necessary to respond effectively to this ToR. Unless specifically requested, extraneous presentation materials are neither necessary nor desired. Submissions will be evaluated on the basis of information submitted by the deadline.

Where the applicant is a company, the proposal must be signed by a duly authorised representative of that company. Where the applicant is a consortium, the proposal must be signed by the lead authorised representative of the consortium, which organisation shall be responsible for the performance of the contract. In the case of a partnership, all the partners should sign or, alternatively, one only may sign, in which case she or he must have and should state that she or he has authority to sign on behalf of the other partner(s). The names of all the partners should be given in full together with the trading name of the partnership.

For any further queries or clarifications kindly send inquiries to ccampion@ciff.org.

### 9. Proposal Assessment Criteria

The following criteria will be used to evaluate proposals, with the technical component weighted as 65% and the financial proposal as 35% of the proposal’s overall assessment.

<table>
<thead>
<tr>
<th>Criteria for Technical Component</th>
<th>Weight</th>
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<tr>
<td>Previous experience with similar assignments</td>
<td>30%</td>
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</table>
Proposed staffing plan (demonstrated technical, managerial and capacity development experience in team members) 30%
Methodology 30%
Professional presentation of technical proposal 10%
Total 100%

Criteria for Financial Component
Realistic illustration of potential expenses 30%
Unit costs for potential expenses 30%
Professional salaries 30%
Professional presentation of financial proposal 10%
Total 100%

Annex 1: TOR
Specifications
1) While the information contained in these terms of reference is believed to be correct at the time of issue, no liability is accepted for its accuracy, adequacy or completeness, nor will any express or implied warranty be given. This exclusion extends to liability in relation to any statement, opinion or conclusion contained in or any omission from, this Terms of Reference (including the annexes) and in respect of any other written or oral communication transmitted (or otherwise made available).
2) Contracting is also subject to the selected party having all necessary authorisations and approvals.
3) Neither the issue of these terms of reference, nor any of the information presented in it, should be regarded as a commitment or representation on the part of CIFF (or any other person) to enter into a contractual arrangement.
4) No publicity regarding these terms of reference, the evaluation, or the award of any contract will be permitted unless and until CIFF has given prior written consent to the relevant communication. For example, no statements may be made to the media regarding the nature of the evaluation, the contents or any proposals relating to it without the prior written consent of CIFF.
5) The applicant shall treat all information obtained as a result of these TOR as confidential and shall not use any such information other than for the purpose set out in these TOR.
6) CIFF reserves the right to:
   a. Waive or change the requirements of these terms of reference from time to time without prior (or any) notice being given by CIFF.
   b. Seek clarification or documents in respect of a submission by a party.
   c. Disqualify any party that does not submit a compliant submission in accordance with the instructions in these terms of reference.
   d. Disqualify any party that is guilty of serious misrepresentation in relation to its submission or expression of interest.
   e. Withdraw these terms of reference at any time, or to re-invite parties on the same or any alternative basis.
   f. Choose not to award any contract as a result of the current procurement process.
   g. Make whatever changes it sees fit to the timing, structure or content of the procurement process, depending on approvals processes or for any other reason.
7) CIFF will not be liable for any bid costs, expenditure, work or effort incurred by a party in proceeding with or participating in this procurement, including if the procurement process is terminated or amended by CIFF.
CIFF’s overhead re-imbursement policy is that we will support indirect re-imbursement up to:

- 10% on true direct programme costs (and approximately allocated HR costs),
- 5% on the value of sub-contracts and sub-grants, and
- 0% on equipment purchases or procurement

Procurement is defined as any substantial purchase of goods directly related to programme goals (vehicles, medical equipment, drug purchases, and substantial travel costs) funded directly, or indirectly, by a CIFF grant.

**Direct and Indirect Cost Definitions**

<table>
<thead>
<tr>
<th>Direct Costs</th>
<th>Indirect Costs</th>
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<tbody>
<tr>
<td>Salaries of employees directly attributable to the execution of the project</td>
<td>Facilities not acquired specifically and exclusively for the project (e.g. Foundation, Institute, or University headquarters)</td>
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<tr>
<td>Includes Project Management</td>
<td>Utilities for facilities not acquired for and directly attributable to the project</td>
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<tr>
<td>Includes administrative support solely dedicated to the project</td>
<td>Information technology equipment and support not directly attributable to the project</td>
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<td>Fringe benefits of employees directly attributable to the execution of the project</td>
<td>General administrative support not directly attributable to the project.</td>
</tr>
<tr>
<td>Includes Project Management</td>
<td>Examples are as follows:</td>
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<tr>
<td>Includes administrative support solely dedicated to the project</td>
<td>• Executive administrators</td>
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<tr>
<td>Travel for employees directly attributable to the execution of the project</td>
<td>• General ledger accounting</td>
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<tr>
<td>Consultants whose work is directly attributable to the execution of the project</td>
<td>• Grants accounting</td>
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<tr>
<td>Office and similar supplies directly attributable to the execution of the project</td>
<td>• General financial management</td>
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<tr>
<td>Sub awards directly attributable to the execution of the project (subject to lower reimbursement rates)</td>
<td>• Internal audit function</td>
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<tr>
<td>Sub contracts directly attributable to the execution of the project (subject to lower reimbursement rates)</td>
<td>• IT support personnel</td>
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<td>Lease costs for facilities newly acquired and specifically used for the grant project (excludes existing facilities). For example:</td>
<td>• Facilities support personnel</td>
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<tr>
<td>A new field clinic</td>
<td>• Scientific support functions (not attributable to the project)</td>
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<tr>
<td>New testing laboratories</td>
<td>• Environment health and safety personnel</td>
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<tr>
<td>Project implementation unit office</td>
<td>• Human resources</td>
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<tr>
<td>Utilities for facilities acquired for and directly attributable to the execution of the project</td>
<td>• Library &amp; information support</td>
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<tr>
<td>Facilities not acquired specifically and exclusively for the project (e.g. Foundation, Institute, or University headquarters)</td>
<td>• Shared procurement resources</td>
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<tr>
<td>Utilities for facilities not acquired for and directly attributable to the project</td>
<td>• General logistics support</td>
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<tr>
<td>• Executive administrators</td>
<td>• Material management</td>
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<tr>
<td>• General ledger accounting</td>
<td>• Executive management (CEO, COO, CFO, etc.)</td>
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<tr>
<td>• Grants accounting</td>
<td>• Other shared resources not directly attributable to the project or Institutional legal support</td>
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<tr>
<td>• General financial management</td>
<td>Research management costs</td>
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<tr>
<td>• Internal audit function</td>
<td>Depreciation on equipment</td>
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