

Terms of Reference

Evaluation of the work of the Bench Marks Foundation



Overview of the work of the Bench Marks Foundation

The Bench Marks Foundation (BMF) can be regarded as the eminent organisation monitoring corporations on their economic, social and environmental practices. Within its work the Bench Marks Foundation puts a strong focus on supporting people in mining affected communities to successfully defend their human rights and fight for social and economic justice. The foundation does this through its four programmatic areas of work:

- Conducting **research** on the effects of mining on communities to support Bench Mark's advocacy work and legal processes with big corporations and government and contribute to creating counter narratives of mining affected communities
- **Capacitating local communities** in areas impacted and affected by mining to analyse and document their challenges and mobilise around human rights issues and resist injustices relating to corporations and government
- **Engaging corporations and government** around human rights and social and economic justice and investing in regional and international solidarity work
- Driving the **advocacy work** of the Bench Marks Foundation around communities struggles for human rights, social and economic justice and **communicating** about Bench Mark's work, also in the media

For more information see the website of the Bench Marks Foundation: [Bench-Marks Foundation](#)

Scope of the evaluation

The Bench Marks Foundation seeks to evaluate its programmatic work from July 2018 to June 2024. The focus of the programmatic work is described broadly above. The last external evaluation was conducted in 2018. An internal evaluation was conducted at the end of 2023. The findings of both processes will be shared with the evaluators.

While the evaluation shall assess the work of BMF overall, the evaluation shall also focus on two specific project agreements with Bread for the World and their accompanying outcomes and indicators (see appendix 1 for more info).

The evaluation shall take external contextual factors into account that had an impact on programme implementation during implementation time (e.g. Covid). It shall also look into internal contextual factors like the organisational transition, especially from 2022 onwards. Finally, the evaluation shall review the contribution the secondment process has had from 2022 on.

Between 2018 and 2023 the BMF's Community Monitoring School worked with 45 to 68 monitors and their local organisations per year. In 2023 9 facilitators worked with 59 monitors in 36 locations, in 15 local municipalities in 6 provinces. The research team of BMF has a few additional implementation sites.

Evaluators shall interact with: monitors and facilitators, community representatives, staff, management and board, other NGOs and partners and where possible with mines and government.

Purpose and objective of the evaluation

The external evaluation is a regular evaluation. Evaluations in BMF are conducted about every 6 years. The objective of the evaluation is to document outcomes of BMFs work and to learn from success and failures of six years of programme implementation. The results will be discussed among staff and with the board and will be presented to various stakeholders. The learning emerging from the evaluation will shape future programme conceptualization and implementation. The results of the evaluation will also be used for the strategy development process for BMFs strategy from 2025-2029.

Key evaluation questions

The external evaluation shall cover all 6 OECD DAC evaluation criteria: Relevance, Coherence, Effectiveness, Efficiency, Overarching developmental impact and Sustainability. The BMF team identified effectiveness and impact as criteria being central to this evaluation and for moving the organization forward.

The key questions based on the evaluation criteria are

Relevance:

1. To what extent are the project goals and Bench Marks work aligned / responsive to the needs of the target groups?
2. Do communities find our work / support relevant?

Coherence:

3. To what extent does the project fit in with other projects / the work of other NGOs in the country and the sector?
4. How well do we interact / cooperate with others?

Effectiveness:

5. To what extent have the project objectives / organizational goals been achieved or are likely to be achieved?
6. To what extent did the activities and outputs contribute to the achievement of the project objectives? Which factors were decisive for the achievement or non-achievement of the project objectives?
7. Is our advocacy strategy clear? Does our advocacy strategy contribute to creating change? Do we change the narrative of mining affected communities? If so, how? How do we work with civil society / solidarity partners? How do we create voice power?
8. How accessible is our material to relevant stakeholders, the broader public and communities? Do communities engage /use the research reports after they are published? Do they understand the language or do they need findings in vernacular or in another form?

Efficiency:

9. To what extent were the inputs of the project (financial, human and material resources) used economically in relation to the outputs produced (products and services)?
10. Are we following **efficient processes** in organizing our work? What could be improved?
11. How well **equipped** are we for our work?

Impact:

12. Which overarching intended positive or negative results can be identified or are foreseeable?
13. What is our **unintended positive / negative impact**?
14. Which **impact** has BMF's work had in communities? What are the **pathways of change**?
15. Are we really achieving the **shifting of power**? Is it impactful? What are the **processes and steps towards effecting change** / shifting power? Where did we succeed with **advocacy and**

engagement to shift power? Where did we **increase community participation** through organizing?

16. What is the **Unique Selling Point** of BMF? What is the organization known for? How unique is our work? What makes it unique?

Sustainability

17. To what extent can the positive effects of the project be assessed as lasting?
 18. To what extent has the project contributed to the target groups being able and willing to maintain the positive effects of the project over time?
 19. To what extent has the project contributed to strengthening the resilience of the target groups?

Seconded personnel

20. Which difference has the **personnel secondment** made in our work?

Evaluation design/ methods

The evaluation is to be conducted in line with the OECD DAC evaluation standards. It is also required to fulfil OECD’s evaluation standards, namely usefulness, feasibility, fairness and accuracy of data. BMF is not committed to any specific evaluation design. The evaluators are expected to develop an evaluation design, using a diverse set of methods. This could include but is not limited to analysis of documents, interviews, focus groups, participatory observation and field visits. Participation of staff, board, stakeholders and target groups in the evaluation process is required.

Process of the evaluation

The table outlines the overall process and states which products are expected at which deadline.

Timeline	What
4 March	Advertising
8 April	Submission of offers
During April	Selection of evaluators and contracting
2 May	Inception meeting
15 May	Inception report submission
23 May	Feedback on inception report
June to mid July	Data collection and analysis
22 July	Submission of draft report
29 July	Discussion of draft report with BMF team
5 August	Presentation of final report to BMF team and Chair
8 August	2 pager with core evaluation outcomes
17 September	Presentation of core findings of final report to BMF board

Expected products

Inception Report

After the inception meeting and the handover of the core documents in digital form, the evaluator(s) shall prepare an Inception Report that describes how the required outcomes will be achieved, which methods will be applied, which data will be collected, how the data will be analysed and triangulated. The inception report shall contain the draft questions / questionnaires to be used during field work as annexes. In addition, the Inception Report shall include a detailed schedule of activities and timelines as well as a preliminary table of contents for the final report. Suggestions may be made by the evaluator(s) that extent

or limit the questions of the ToR. BMF must agree to these suggestions. The inception report should not exceed 15 pages (plus annexes).

Evaluation Report

The Evaluation Report must present the results from the evaluation process, including the results of the document review and the empirical research phase. The findings, conclusions and recommendations need to be thorough and based on evidence. The Evaluation Report must include an executive summary including a short description of the goals of the evaluation, the key findings according to the OECD/DAC criteria and recommendations. The Evaluation Report shall not exceed 40 pages (excluding annexes).

Two-pager

A graphically appealing 2-pager with the key findings and recommendations is expected.

Budget and contracting

The available budget for this evaluation is ZAR 280,000. Payment terms can be proposed in the offer and will be agreed upon during contracting.

Key qualifications of the evaluators

Qualifications and expertise required:

1. Professional experience in conducting programme and organizational evaluations as sole evaluator or team leader
2. Profound expertise in quantitative and qualitative empirical data collection and analysis methods
3. Experience in developing and reconstructing Theories of Change (ToCs)
4. Experience in organisational development and change management
5. Extensive work experience in development cooperation
6. Experience with civil society, especially NGOs
7. Interest in and commitment to social and economic justice and human rights
8. Good understanding of social movements and community based advocacy processes
9. Knowledge of the context of communities affected by extractives
10. Fluency in written and spoken English. Knowledge of SeTswana, SePedi and Zulu is important for field work.
11. If a team is applying, the team should include evaluators of different genders. If one evaluator applies we require gender sensitivity.

Content of the evaluator's offer

A complete offer consists of:

1. A **technical proposal**, which lays out the evaluation design, specifying methods and instruments to be used to answer the evaluation questions
2. A detailed overview of the **evaluation process** (work plan including time schedule)
3. A **financial proposal** stating all costs including taxes (e.g. VAT) for each budget line like daily fees for each evaluator(s) and cost of travel.
4. **CVs** of participating evaluator(s) with career details and experience relevant to the offer.
5. A **company profile**, if applicable
6. **3 references** (including at least 2 references from previous clients of organisational evaluations the evaluator(s) has / have carried out.

We reserve the right to conduct interviews in order to reach a decision. Furthermore, we reserve the right to award the contract at the time of submission of the offer. We also reserve the right to not award a contract. Only complete offers will be considered. The evaluation contract will be granted based on the following award criteria and weighting:

Award criteria	Weight of award criteria in %
Quality of the technical proposal, with a special focus on understanding the ToR and proposed methodology	30%
Qualifications of the evaluator(s)	40%
Financial Proposal	30%

Complete offers must be submitted no later than **8 April 2024** to the email address below:

Bench Marks Foundation
Greenacres Office Park, Cotswold House
Rustenburg Road & Victory Road
Randburg 2196, South Africa
recruit@bench-marks.org.za

Appendix 1

Information on Bread for the World projects

Bread for the World. The projects are entitled: Towards increased corporate accountability and the redistribution of wealth.

Project 1 ran from July 2019 to June 2022. It had the following objectives and indicators:

Objective: Multinational companies are held accountable for the impact of their business activities on the human rights of communities in the affected areas

Indicators: 1. Each year, strategically positioned mining companies (e.g. Anglo American, Sibanye Gold, Africa Rainbow Minerals, SASOL) and government agencies resolve at least 3 human rights violations disputes in mining affected communities through alternative dispute resolution mechanisms based on elements of the IPSS, 2. A third of the training participants are active as multipliers in their communities (measured by actions and campaigns), 3. Submissions by BMF (possibly with networks) on legislative changes to the benefit of mining affected communities have been accepted by decision-makers (e.g., Mineral and Petroleum Resources Development Act, Traditional and Khoisan Leadership Bill, Right to Informed and Prior Consent)

Project 2 began in July 2022 and is running until June 2025. It has the following objectives and indicators:

Objective 1: Research outputs on the effects of mining on communities and on alternative justice narratives successfully drive Bench Mark's advocacy work and legal processes with big corporations and government; **Indicators:** 1. Every year one BMF study is launched and discussed with relevant power holders and follow-up engagements take place, 2. In two cases per year BMFs policy inputs are taken into consideration by the relevant stakeholders and/or legal actions are pursued

Objective 2: Capacitated local communities in areas impacted and affected by mining engage with corporations and government around human rights and resist; **Indicators:** 1. In three cases per year power holders (mines or government) are held accountable by communities as identified in their action plans (In at least one case per year the particular socio-economic challenges faced by women are addressed, 2. Twice a year 5 community engagement forums, organised by community monitors and facilitators, are held that drive the communities' advocacy agendas around human right issues to be addressed forward

Objective 3: Bench Mark's media work supports the organisation's research and advocacy agenda around communities struggles for human rights, social and economic justice; **Indicators:** 1. Four advocacy issues raised by communities around human rights or social and economic justice per year are reported on in media channels (regional and national TV stations, community and national radio, 2. The annual conference and two media events per year take up Bench Marks advocacy issues around human rights or social and economic justice and lead to further action