Call for Tender

Fairtrade Foundation and Fairtrade Africa are commissioning an external evaluation of the Special Initiative grant from the Trade Programme of Comic Relief to Fairtrade. The primary objective of the study is to evaluate to what extent the objective of the project has been achieved.

The context, background, objectives, scope, suggested methodology and approach and expected outputs of the study are outlined in the Terms of Reference (ToR).

Interested research organisations / consortiums are requested to send a brief e-mail to Wangeci Gitata w.gitata@fairtradeafrica.net and Fran Robathan frances.robathan@fairtrade.org.uk to confirm their interest in submitting a tender, with final tender documents / proposals to be submitted to the same addresses by Friday 9 August 2013.

The tender documents submitted should include:

1. Detailed research proposal based on the ToR provided that includes a clear description of the intended scope and methods to be used, work plan, potential risks, research policy and ethical standards to be followed and a detailed timeline (using the broad timelines provided in the ToR)
2. Detailed budget for this study based on the broad budget range indicated in the ToR
3. Description of the tendering party/parties highlighting relevant experience in undertaking project assessments and evaluations
4. Detailed CVs of all members of the proposed research team highlighting research experience relevant to this study
5. Names and contact details of two organisations for whom similar work has been conducted in the last two years and submission of two examples of recent research work undertaken by the tendering party/parties in a related field

Evaluation of proposals will be guided by the following criteria:

- Expertise and qualifications of the research team and research organisation/s
- Understanding of Fairtrade in producing and marketing countries
- Strength and appropriateness of methods proposed to answer the key research questions of the study with a special focus on evaluation techniques, method of attribution and participatory research methods
- Quality of written reports
- Efficiency and use of resources
- Collaboration with research institutions / researchers in countries and regions which will be the focus of this evaluation

Applicants will be notified within 14 days after the submission deadline in writing about the result of the selection.
Terms of Reference

Final evaluation of Special Initiative grant from Comic Relief
Fairtrade for Development in Africa (FTDA) / Grant ref: GR002-11980 / 1/7/2007 – 30/9/2013
And a Climate Change supplement / Grant re: GR002-12474

Background to the Special Initiative grant:

<table>
<thead>
<tr>
<th>Year</th>
<th>Global total POs</th>
<th>POs in Africa...</th>
<th>from countries in Africa</th>
<th>POs (Africa) selling to UK</th>
<th>from countries in Africa</th>
</tr>
</thead>
<tbody>
<tr>
<td>2002</td>
<td>350</td>
<td>35 (10%)</td>
<td>?</td>
<td>15</td>
<td>7</td>
</tr>
<tr>
<td>2012</td>
<td>1096</td>
<td>316 (30%)</td>
<td>28</td>
<td>226</td>
<td>25</td>
</tr>
<tr>
<td>+ 10 years</td>
<td>+ 746 POs / over 3 fold growth</td>
<td>+ 281 POs / trebling the % of global total</td>
<td>?</td>
<td>+ 211 POs / over 15 fold growth</td>
<td>+ 18</td>
</tr>
</tbody>
</table>

- Fairtrade for Development in Africa (FTDA) was the largest grant awarded by Comic Relief under its Trade Programme and was the largest grant received by Fairtrade; its impact has been wide-ranging: broadening (see figs above), deepening – producers are now at the heart of Fairtrade, and strengthening – Fairtrade Africa is an increasingly sustainable organisation supported by the global Fairtrade system.
- Comic Relief has been a champion of learning and monitoring & evaluation which has influenced Fairtrade’s focus onto this; e.g. M&E post at Fairtrade Africa has developed indicators for measuring internal effectiveness of Fairtrade Africa

Purpose of the External Evaluation

The purpose of the Special Initiative funding has been to contribute to the reduction of poverty in Africa by scaling up the Fairtrade Labelling system as a way of improving the social and economic position of farmers and workers, and supporting their efforts to achieve sustainable development in their communities. As the grant comes to an end, the final evaluation by an external body should study to what extent the funding has contributed to this aim.

Setting up Fairtrade Africa – creating a continental secretariat with regional, country and product networks – to represent and connect with the Fairtrade certified producers in Africa was a direct response to requests from producers. The intent in creating Fairtrade Africa (previously called the African Fairtrade Network or AFN) was to facilitate communication between the producers and the Fairtrade system and to offer services, information and support to producers beyond certification, to deliver the overall objective of the project.
Core objectives of the evaluation

1. To evaluate to what extent the outcomes and outputs of the project have been achieved
2. To evaluate the role of the Fairtrade Foundation as grant responsible organisation and in generating market interest for Fairtrade
3. To evaluate the impact that Comic Relief funding has had on Fairtrade Africa and its work (including progress against objectives, achievements and challenges) and to extract what learning there may be for the future engagement of Comic Relief with Fairtrade
4. To evaluate the sustainability of Fairtrade Africa beyond the life of the Comic Relief grant
5. To supplement Fairtrade’s reporting to Comic Relief thus far
6. To evaluate the effectiveness of the grant in seeding new initiatives eg establishing the markets in East and South Africa and the Technical Assistance Fund, ask.Malawi, country and product networks, etc

Original Project Proposal: (see Annex 1)

Objectives of the project in Africa as specified in 2006/7 when proposal was written

Sample specific objectives to fulfil the overall aim:

- Build producer capacity and strengthen networking of producers and workers in Africa
- Provide support, information and feedback on Fairtrade standards so that the system meets the needs of producers in Africa and provides benchmarks for continual improvement
- Increase the scale and scope of the Fairtrade market and support access for disadvantaged producers from Africa
- Strengthen the voice of African producers regionally and internationally within the Fairtrade Labelling system
- Build advocacy capacity in wider political debates
- Employ new and innovative media instruments to reach more and new consumer groups with staying power
- Develop local markets in Africa – pilot case: South Africa Fairtrade Labelling Initiative
- Ensure continued learning within the project through monitoring and evaluation and improve Fairtrade system

Outcomes of the project in Africa as expected in 2006/7 when proposal was written:

Sample expected outcomes by the end of the project:

- Increased standard of living of farmers and workers and their families in Africa
- Increased Northern and Southern market opportunities for African Fairtrade producers
- Annual increase of worldwide retail volume of FAIRTRADE products increases by at least 25%
- Increased growth rate of newly Fairtrade-certified producer organisations in Africa from 30 to 50 annually
- Total number of Fairtrade-certified producer organisations in Africa to reach 400 and more
- African Fairtrade producers can sell on average at least 30% (double) of their produce under Fairtrade conditions
- More effective advocacy in international trade arenas by AFN
More effective representation for African farmers and workers within the Fairtrade system
Improved compliance with Fairtrade standards by African producers
Increased African producers’ response rate to standards consultations
Producers of new products able to join Fairtrade markets
Continuously improved Fairtrade labelling system mechanisms thanks to ongoing M&E and inbuilt learning loops

Overall approach

Approach

Fairtrade’s vision as articulated in its Theory of Change is ‘a world in which small producers and workers can enjoy secure and sustainable livelihoods, fulfil their potential and decide on their future.’

To achieve this vision, the three impact goals of the Fairtrade system are to:

1. **Make Trade Fair**: Fairtrade aims to create an environment in which small producers are able to develop sound, resilient businesses, workers are able to exercise their rights and freedoms and earn a living wage, consumers are informed and demand fair trading practices as the norm, and policies (public sector and private sector) support and enable sustainability in trade. Key objectives for making trade fair include: offsetting market volatility and risk and a lack of transparency in supply chains; fostering investments in agriculture and rural communities; and ensuring respect for labour rights, environmental sustainability and good governance in trade.

2. **Empower small producers and workers**: Fairtrade understands empowerment as “the expansion of assets and capabilities of people to participate in, negotiate with, influence, control and hold accountable the institutions that affect their lives”. Fairtrade aims to support processes of empowerment among small producers and workers by helping them build up their grass-root organisations, improve their negotiation position with buyers/employers, achieve economic stability, build collective assets and achieve economic and political empowerment.

3. **Foster sustainable livelihoods**: A livelihood comprises the capabilities, assets and activities required for a means of living. It is sustainable when it can cope with and recover from stresses and shocks and maintain or enhance its capabilities and assets, while not undermining the natural resource base. Fairtrade aims to foster sustainable livelihoods among small producers and workers by enabling improvements in income, decent working conditions, improved living conditions and sustainable ecosystems.
Fairtrade’s impact goals and approach are captured in the diagram below.

Principles of operation of the evaluation:

We would like bids to reference how the evaluation would adhere to the principles of NGO evidence as drawn up by Bond:

1. Voice and Inclusion: the perspectives of people living in poverty, including the most marginalised, are included in the evidence, and a clear picture is provided of who is affected and how
2. Appropriateness: the evidence is generated through methods that are justifiable given the nature of the purpose of the assessment
3. Triangulation: the evidence has been generated using a mix of methods, data sources, and perspectives
4. Contribution: the evidence explores how change happens and the contribution of the intervention and factors outside the intervention in explaining change
5. Transparency: the evidence discloses the details of the data sources and methods used, the results achieved, and any limitations in the data or conclusions.
Key individuals for interview:

General view: Fairtrade Africa: Wangeci Gitata and James Mwai
Fairtrade International: Chris Davis
Fairtrade Foundation: Fran Robathan, Eileen Maybin, Vidya Rangan
Fairtrade Label South Africa: Boudewijn Goossens
Comic Relief: Sian Herschel

Deliverables:

The successful bidder will be expected to produce:
- Final methodology and tools used for the evaluation.
- A draft report for discussion.
- A final report following consultation with Fairtrade.
- Presentation of findings to Fairtrade and Comic Relief.

The final report should be a concise report, written in plain English, in a format which is accessible to all stakeholders. The report should provide a clear summary of the main findings against the specific objectives of the Special Initiative, and should provide lessons and recommendations for the future. An executive summary should be provided, along with annexes containing a list of people and organisations interviewed, a list of documentation reviewed, and any other relevant information.

Timeline:

The project is on a no cost extension for spending which ends on 30 September 2013. The review process shall begin from the beginning of quarter 3, 1 July 2013, and should take no longer than 6 months. The proposed time frame is therefore:

- Expression of interest submitted: Friday 26 July 2013
- Shortlisted candidates invited to submit full proposal: Tuesday 30 July 2013
- Submission of full proposals: Friday 9 August 2013
- Evaluator appointed, research partners finalised and contract signed: Friday 23 August 2013
- Inception meeting with all relevant stakeholders: Wednesday 28 August 2013
- Evaluation conducted between August and December 2013
- An initial draft report for discussion with Fairtrade no later than Friday 31 January 2014
- A final report, agreed with Fairtrade, for submission to Comic Relief by Friday 14 February 2014

Budget:

The budget, as set aside as part of the project expenditure in the final phase of the project is Twenty Eight Thousand Pounds (£28,000). We would like bids in response to this call for proposals to give a clear breakdown of costs and assessment of what would be required to deliver the outcomes of the evaluation.