



Request for Proposals

Independent evaluation of the World Benchmarking Alliance

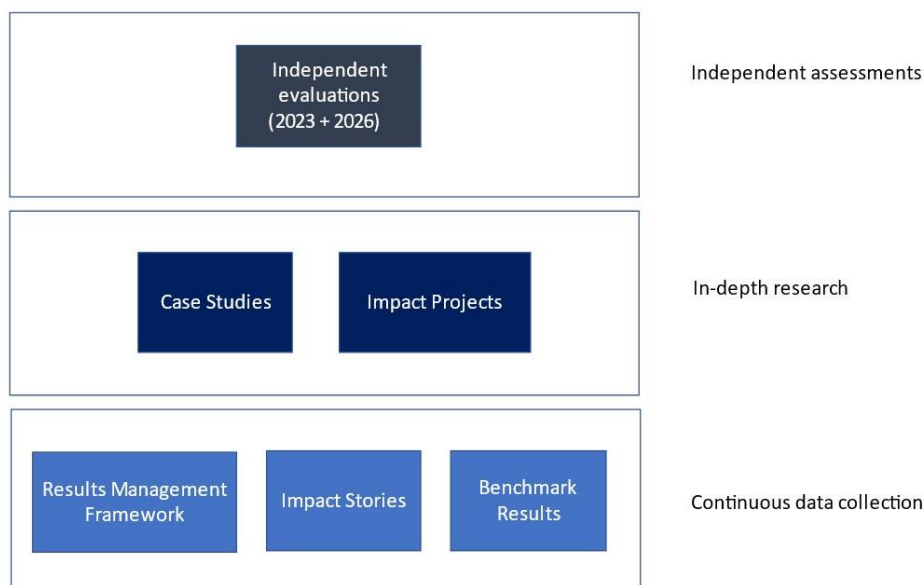
Deadline for responses: 16 June 2023

Background

This document contains the Terms of Reference for the evaluation of the World Benchmarking Alliance (WBA). It sets out the objectives, scope, evaluation questions, requirements and budget.

WBA is committed to improving its organisational performance and effectiveness by monitoring progress on a continuous basis, by doing in-depth research and by regularly undertaking independent, third-party evaluations (see figure 1).

FIGURE 1: WBA'S 3-TIERED IMPACT MODEL



The [2020 independent evaluation](#) focused on WBA's first two years of operation (Sept 2018 – Dec 2020) and was published in early 2021. We are looking for a suitable, independent partner to execute a follow up evaluation.

Interested parties ('you') are invited to bid for the full scope of this evaluation. This document is provided to enable you to develop initial cost estimates and options to deliver the evaluation and, as such, should not be viewed as any form of agreement between you and WBA.

About the World Benchmarking Alliance

WBA's free and publicly available benchmarks outline what companies need to do so that all of us can have a more resilient future and ultimately meet the UN's Sustainable Development Goals (SDGs). They equip everyone – from governments and financial institutions to civil society organisations and individuals – with the information they need to hold companies accountable.

WBA brings together a diverse and growing group of organisations from across the globe that are motivated by the common ambition to create a world that works for all as embodied by the SDGs. We share the vision that achieving these goals requires a systems perspective, as the 17 SDGs are interlinked. We also agree that to accomplish systemic transformation, the private sector has a key role to play. WBA uses a systems approach to develop benchmarks, placing a strong emphasis on transforming the systems that have the greatest potential to drive economic, environmental and social progress. Systems thinking helps us make better sense of the issues as well as identify the most influential companies in each system.



FIGURE 2: SEVEN SYSTEMS TRANSFORMATIONS



By 2024, WBA will have benchmarked 2,000 companies – the [SDG2000](#) – across [seven systems transformations](#) that are vital for putting our society, planet and economy on a more sustainable and resilient path over the next decade and beyond (Figure 2). We are developing benchmarks for all seven systems with accompanying methodologies.

WBA has over 350 [Allies](#), representing organisations working at global, regional and local levels to shape the private sector’s contributions to achieving the SDGs. Allies help us ensure that our methodologies, results and insights are used by companies, investors, policymakers and civil society, and help us transform our work to create meaningful centres of impact. Participation in the Alliance is designed to be voluntary.

Figure 3 visualises WBA’s ‘strategy house’, illustrating our vision, mission, strategic pillars, values and foundation.

FIGURE 3: WBA STRATEGY HOUSE



Purpose and research objectives

The purpose of this evaluation is twofold: being accountable and improving our performance. This evaluation would allow us to report, in an independent and impartial way, on results, influence and impact five years after WBA’s launch. This is particularly important for donors but also WBA Allies and WBA’s Supervisory and Executive Board.

Secondly, this evaluation should identify lessons learned and formulate actionable recommendations for strengthening the effectiveness and impact of our benchmarks. The evaluation should provide greater insights into why results were or were not achieved. These lessons learned and recommendations will be used as inputs in decision-making and identifying where we need to adapt and strengthen, and what should be our learning priorities.



Next to these evaluation purposes, we believe independent evaluations can contribute to building the wider evidence base on the effectiveness and influence of benchmarking. Therefore this evaluation is also intended to be a source of public learning, to be shared with stakeholders on WBA’s website and other relevant platforms, particularly with our Allies.

Evaluation methodology

Interested parties are asked to tender an outline of the proposed evaluation methodology. This evaluation should build on existing quantitative and qualitative data collected by WBA and include additional data gathered from internal and external sources and stakeholders during the process. The proposal should include a high-level evaluation matrix (to be further developed and refined in the inception phase) showing how each of the evaluation questions will be addressed, including anticipated evaluation methods (such as outcome harvesting) and information sources.

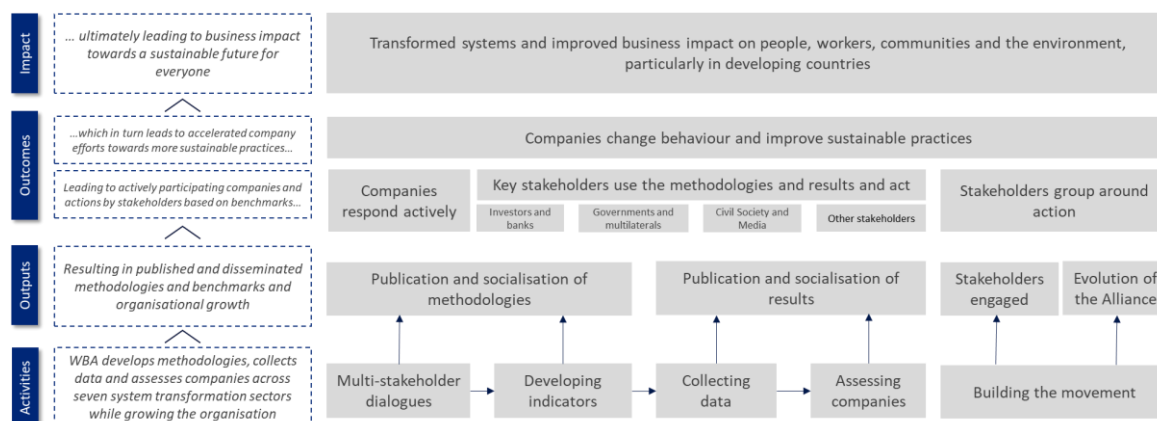
The evaluation should adhere to international best practice standards in evaluation such as the [OECD’s Quality Standards for Development Evaluation](#). Existing contextual and monitoring data will be made available to the evaluation team, including our results management framework (RMF)*, impact stories, case studies, annual reports, quarterly reports, impact projects, funding proposals and other relevant materials such as WBA’s Learning Agenda*. Bidders are also expected to outline potential risks and challenges for the evaluation and how these will be managed.

Scope

Figure 4 shows WBA’s Theory of Change, which outlines how WBA’s activities and subsequent outputs lead to the outcomes and impacts that deliver our mission. For this evaluation and considering the fact that WBA is only five years young, this evaluation should focus mostly on intermediate and ultimate outcomes, and wherever possible, impact. Benchmarks that have gone through more than one iteration provide most insight on the outcome level as they identify changes overtime and have had sufficient time to build relationships and (collective) action initiatives with stakeholders.

The evaluation should be designed to provide an independent, systematic assessment of progress, including both quantitative and qualitative data triangulated across multiple sources, and should build on data gathered through WBA’s monitoring tools. Its design should build on the findings of the previous evaluation and facilitate learning and provide clear insights into why certain actions and interventions have been successful or not. We are looking for actionable recommendations and guidance for the future that will help maximise our influence and impact.

FIGURE 4: WBA THEORY OF CHANGE



* Available upon request for interested bidders



Evaluation questions

Proposed evaluation questions are outlined below. Bidders may propose alterations, as deemed appropriate. The set of questions will be finalised in conjunction with WBA during the inception phase.

- 1) *In what ways are key stakeholders using WBA methodologies, insights and results to hold companies to account on their sustainability commitments?*

Through this question we want to get a better understanding of the intended and unintended outcomes that have been achieved so far. As WBA's audience includes various stakeholder groups we would like to develop better insight regarding differences in uptake of methodologies, results and insights between these groups and factors explaining these differences. Sub-questions could include: What is the actual, and potential, added value of WBA materials for different stakeholder groups? To what extent do WBA benchmarks and activities respond to the needs and priorities of different stakeholders? How can we maximise the value for stakeholders? Following the outcomes of the previous evaluation, this evaluation should include a strong focus on investors. Relevant contextual changes (e.g. legislation) should also be taken into account.

- 2) *How do WBA benchmarks and stakeholder actions based on WBA benchmark results lead to changes in company behaviour?*

This question should focus on developing a deeper understanding of how a) WBA benchmarks (including their development process) and b) stakeholder actions based on benchmark results are influencing change in companies and what this change process looks like. We are particularly interested in identifying critical success factors and the conditions under which benchmarking is or is not effective in changing company behaviour and the extent to which changes are likely to last. For example, how does investor engagement using benchmark results influence companies? This should include a focus on WBA's Communities of Practice (COPs) and Collective Impact Coalitions (CICs). In addition, we suggest focusing on how WBA's policy input influences evidence-based policy outcomes.

- 3) *How and to what extent does strong performance in the benchmark cascade through to positive impact on people and the planet, particularly in developing countries?*

This question should provide some insights into the link between benchmark performance and a company's impact on people and the planet. We are particularly interested in how benchmarks affect company behaviour along the value chain. Performance in the benchmark can refer to a company's overall ranking, scores within a particular measurement area or indicators which are critically impactful to that industry. We are looking for signs of influence, change and impact on people and the planet, particularly in developing countries.

- 4) *What is the added value of the Alliance for Allies?*

This question focuses on the extent to which WBA complements and adds value to and is compatible with other interventions in the corporate accountability and sustainability ecosystem. We are particularly interested in whether this added value looks different for different stakeholder groups and for different geographic regions as well as how we can add more value for current and potential Allies.

In addition to these evaluation questions, the evaluator should provide some insights into how effective WBA is allocating its efforts and resources to its most influential and impactful activities.

Milestones, deliverables and timelines:

Expected milestones and deliverables (though we are open to partners suggesting additions or other considerations) include:



TABLE 1: MILESTONES AND DELIVERABLES

Milestone/ deliverable	Indicative date
Submit questions regarding the RFP	25 Apr – 22 May 2023
WBA will respond to questions in written format or arrange discussions with bidder(s) for more detailed conversations	On a rolling basis, 25 Apr – 26 May
Deadline for RFP responses	16 Jun 2023
Selection of top bidder and notification to unsuccessful bidders	By 7 Jul 2023
Upon notification, contract negotiation with winning bidder will begin immediately	Jul 2023
Kick off session	Early Aug 2023
Share inception note including final evaluation matrix of key issues, questions and data sources, approach to sampling stakeholders, work plan, timelines	29 Aug 2023
Data collection and analysis	Sep – Nov 2023
Draft evaluation report	17 Nov 2023
Final evaluation report	18 Dec 2023
Presentation of findings to wider WBA team	Jan 2024

Budget and terms of payment

The maximum ceiling for this evaluation is EUR 69,000, including VAT. Detailed budgeting (in EUR) is encouraged, including:

- Fee rates for each individual proposed
- Level of effort per individual over the course of the evaluation, broken down by task/deliverable
- Expected travel costs
- Other expected costs, with brief description

Payment terms for the award shall be on a fixed fee basis. Payment is dependent upon receipt of valid invoice, and contingent upon successful completion of deliverables and related activities. Final payment terms in the contract will control, not this RFP.

Tender conditions and confidentiality contractual requirements

This section of the RFP sets out WBA's contracting requirements, general policy requirements and the general tender conditions relating to this procurement process. Please note the following:

- The contracting authority is WBA which includes any subsidiary companies and other organisations that control or are controlled by WBA from time to time.
- The process will be conducted in line with WBA's [procurement policy](#).
- All information supplied to you by the WBA, including this RFP and all other documents relating to this procurement process, either in writing or orally, must be treated in confidence and not disclosed to any third party (save to your professional advisers, consortium members and/or sub-contractors strictly for the purposes only of helping you to participate in this Procurement Process and/or prepare your tender response) unless the information is already in the public domain or is required to be disclosed under any applicable laws.
- You shall not disclose, copy or reproduce any of the information supplied to you as part of this Procurement Process other than for the purposes of preparing and submitting a tender response. There must be no publicity by you regarding the procurement process or the future award of any contract unless WBA has given express written consent to the relevant communication.



Requirements and desirable skills

We seek an individual or team of evaluators for this independent evaluation. The consultant(s) must be able to demonstrate the following requirements:

- Experience and excellent understanding of Monitoring, Evaluation and Learning concepts and tools including Theory of Change, result management framework, and research methods suitable for outcome-based learning and evaluation such as outcome harvesting.
- Significant and proven experience with designing and undertaking complex evaluations of multistakeholder, global initiatives.
- Excellent verbal, analytical and report writing skills in the English language.
- Ability to operate independently, maintain regular contact and time management to deliver high quality, concise and timely results.

Response format and how to apply

Successful proposals (10 page max, excluding attachments) include the following details for consideration:

- A brief overview of your organisation and team, including track record and expertise in relevant areas of work. You are encouraged to share relevant previous evaluations and other relevant assignments and testimonials from previous clients.
- Outline of proposed steps and evaluation methodologies, and data collection methods.
- Approach to project management and how you propose to work with us.
- Rates and prices, potentially as a range of options, should be inclusive of all costs and in EUR, including planned expenses, travel, VAT or any other applicable taxes. The budget should be clear and transparent and costs should be separately presented. The consultant(s) fees and number of working days anticipated should be included at a minimum.
- Indicative daily rate range for contracts. State clearly any assumptions made.
- One-page CV for each consultant, matching expertise and experience to the work components and requirements and location.
- Clear description of availability for the requested period and ability to achieve deadlines as outlined, including ability to dedicate resources appropriately to meet deadlines.

Interested parties can send their written proposals to Lisanne Urlings (l.urlings@worldbenchmarkingalliance.org) and cc Will Disney (w.disney@worldbenchmarkingalliance.org) by 16 June 5PM CEST. Any proposals received after this date and time will not be considered. Questions can also be submitted to Lisanne and Will by 11.59 PM CEST on 22 May but preferably before. Written answers will be provided on a rolling basis or parties are invited for a more detailed conversation.

Basis of award

All proposal become the property of WBA and will be assessed by this evaluation's Reference Group. Proposal will be assessed using the following criteria and rating scale:

- Methodology and approach: clear, credible and structured proposed methodology and feasibility; understanding of WBA and evaluation scope and context; potential risks and challenges and mitigation approaches.
- Capabilities and experience: experience undertaking complex evaluations, ability to communicate with non-MEL audiences, understanding of corporate accountability ecosystem, ability to deliver high-quality, concise, and timely results, ability to identify limitation and challenges, collaborative approaches.
- Project and quality management: ability to operate independently, maintain regular contact and time management to deliver to deadlines, quality management processes.



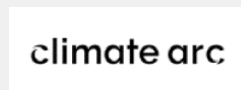
- Budget and value for money: overall cost, clarity and transparency of budget preparations and plans, cost efficiency, completeness of financial considerations.

Tender responses will be subject to an initial review. Any tender responses not meeting mandatory requirements will be rejected in full and will not be assessed or scored further. Tender responses not rejected will be scored using the following scoring model:

TABLE 2: SCORING MODEL

Points	Interpretation
10	Excellent – Overall the response demonstrates that the bidder meets all areas of the requirement and provides all of the areas evidence requested in the level of detail requested. This, therefore, is a detailed excellent response that meets all aspects of the requirement leaving no ambiguity as to whether the bidder can meet the requirement.
5	Good – Overall the response demonstrates that the bidder meets all areas of the requirement and provides all of the areas of evidence requested, but contains some trivial omissions in relation to the level of detail requested in terms of either the response or the evidence. This, therefore, is a good response that meets all aspects of the requirement with only a trivial level ambiguity due the bidders failure to provide all information at the level of detail requested.
0	Poor – The response does not demonstrate that the bidder meets the requirement in one or more areas. This, therefore, is a poor response with significant ambiguity as to whether the bidder can meet the requirement due to the failure by the bidder to show that it meets one or more areas of the requirement and/or no response has been provided





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