

TERMS OF REFERENCE

Oxfam is a global movement of people who are fighting inequality to end poverty and injustice. Across regions, from the local to the global, we work with people to bring change that lasts.

OVERVIEW	
Title and brief description of the assignment	Consultancy to conduct End-of-Strategy Evaluation and to lead a Strategy Refresh process for the Program and Influencing Strategy for Oxfam in Southern Africa Cluster 2026 to 2030.
Assignment location	Southern Africa Cluster: Zambia, Mozambique, Malawi and Zimbabwe
Contract start date	15 th June 2025
How to apply	Interested candidates are invited to submit: <ol style="list-style-type: none"> 1) A proposal describing how the evaluation and strategy refresh will be conducted (including a budget in a separate file) 2) CV (s) 3) A sample of an evaluation and a Program and/or Influencing Strategy process that has already been carried out or facilitated by the applicant See section '8. Application Process' for further details
Application deadline	1 st June 2025
Specific considerations	The applicant will have to use/make reference to specific Oxfam resources, e.g. Influencing for Impact guide and work in collaboration with an internal technical team . Further details will be provided to the successful applicant.

1. PURPOSE OF THIS CONSULTANCY

The direct motive for this procurement for consultancy services is to facilitate an independent evaluation of the Oxfam in Southern Africa (SAF) cluster strategy framework (2021 – 2025) and to lead a process of refinement and realignment culminating into a Program and Influencing Strategy for Oxfam SAF Cluster 2026 to 2030.

The **End-of-Strategy Evaluation** will aid in assessing program performance, impact and contributions to wider systemic change, lessons learned, and cross-cutting issues in line with the SAF cluster strategy ambitions during the period from 2021 to 2025.

The **Strategy Refinement Exercise** aims to align the next five-year strategic framework with both the newly adopted Oxfam in Africa Programme and Influencing Strategic Framework, Oxfam's Global Strategic Framework, and the evolving operational context in the region.

2. BACKGROUND AND CONTEXT

Oxfam in Southern Africa is part of a broader movement working with marginalized and vulnerable communities to challenge structural inequalities and advocate for transformative development models. Our current regional strategy framework (2021–2025) outlines our commitment to fostering a just and sustainable future for all in the region. This strategy is built around three key thematic pillars or programs:

- **Just Economies**
- **Humanitarian Action**
- **Gender Justice**

The strategy also has two cross cutting themes: Accountable Governance and Civic Space. The interventions, implemented primarily in countries where Oxfam has a physical presence, are also strategically leveraged to influence

regional and global platforms. For instance, our work on fiscal justice, including sustainable debt management and domestic resource mobilization, connects directly to global advocacy efforts on debt cancellation and aid effectiveness.

Our approach is centred on empowering local actors to influence the systems and institutions that govern power and resource distribution. We are driven by a commitment to impact, quality, relevance, legitimacy, and solidarity. Oxfam in Southern Africa also contributes to national development frameworks, the UN Sustainable Development Goals (SDGs), and the African Union's Agenda 2063.

This regional strategy aligns with Oxfam's Global Strategic Framework (to 2030), which aims to:

- Mobilize resources for sustainable, poverty-alleviating development.
- Strengthen resilience, protect lives, and support rights in times of crisis.
- Tackle structural inequalities and drive durable systemic change.
- Advance intersectional feminist approaches to challenge injustice.

In preparation for this end-of-strategy evaluation and strategy refresh, a number of internal processes have taken place that will be of interest to this Consultancy. First, Oxfam SAF cluster has conducted a meta-synthesis of evidence and learning in line with cluster's knowledge and learning agenda and has also curated potential secondary sources of knowledge and learning in the form of a knowledge and evidence database. The meta-synthesis provides a general overview of some of the lessons learnt from programming during the strategy period and the database also maps the knowledge resources to key learning questions that were outlined in the knowledge and learning framework. Oxfam SAF cluster has also recently completed a mapping of results and milestones to the cluster's program framework to build a general trend analysis of progress achieved over the strategy period.

This Consultancy will build on this background work to provide more concrete rigorous analysis of impact attribution and contribution to wider systemic change, lessons learnt and objective analysis of the predetermined and other emerging critical learning questions.

The strategy review and strategy refresh process are intrinsically linked to Oxfam confederation wide strategy processes. As such reference to and engagement with various Oxfam resources and tools such as the Oxfam Global Strategic Framework (GSF) and Horizon Roadmaps, Oxfam in Africa Program and Influencing Strategy, Oxfam Influencing for Impact Guide, among others, will be critical for the Consultancy.

3. SCOPE OF WORK

The scope of work for the **End-of-Strategy Evaluation** includes:

1. Reviewing the overall strategy and program performance against set strategic objectives, thematic pillar change goals and pathways to change, or outcomes.
 - a. Reviewing the extent to which the Thematic Pillars; Gender Justice, Just Economies and Humanitarian have met their pillar goals and the extent to which there was alignment of activities with identified pathways within each Thematic Pillar
 - b. Review extent to which each Pillar was able to achieve influencing outcomes.
 - c. Determine impact (short-term and long-term) of the strategy on the target populations and communities, and environment, providing evidence of the value created by the strategy (identifying both positive and negative, intended and unintended changes) resulting from the SAF strategy and operations.
2. Review the extent to which the Pillars were able to achieve outcomes related to the crosscutting themes: Accountable Governance and Civic Space
3. Review the barriers and enablers that have led to the achievement of the results for the current strategy
4. Provide informed recommendations based on evaluation findings that can guide future programming, policy development, and resource allocation building up to the strategy review/refresh.
5. Document best practices, effective strategies and methodologies utilized during the strategy period that can serve as reference material for practitioners, policy makers and organizations working in similar fields.

For the end-of-strategy evaluation, the Consultant(s) may apply the OECD evaluation criteria of relevance, effectiveness, efficiency, sustainability, coherence and impact and should be able to develop an evaluation matrix of the proposed evaluation questions covering each of these criteria at inception stage.

The scope of work for the **Strategy refinement and realignment** includes:

1. Produce an updated context analysis, regional and thematic which shows the key changes in the external context and highlight any key changes that will inform the choices for the next Strategic period. This should include but not limited to political, economic, social, technology, environment legal and policy context.
2. Align the 2026 to 2030 SAF Cluster Program and Influencing Strategy to the Global Strategic Framework, Horizon Roadmap and Oxfam in Africa's Program and Influencing Strategy informed by the relevant issues from the context analysis.
3. Using the Oxfam Influencing for Impact guide, working with an internal technical team, support the development of the Influencing Strategy that will be integrated within the overall SAF Program Strategy to create a Program and Influencing Strategy.

EXPECTED OUTPUTS

Output 1: Inception report and data collection tools

Consultant(s) are expected to develop an inception report within 7 days after being engaged by Oxfam in Southern Africa and receiving an information package of the required reference tools and documentation. The inception report should summarise the consultant's understanding of the ToRs, evaluation design, sampling methods to be used, detailed data collection methodology, a workplan, and a full budget. The consultant(s) should also submit all data collection tools to be used for data collection during the evaluation and a suggested report outline for approval by Oxfam in Southern Africa.

Output 2: Preliminary Results Validation Meeting

Preliminary findings should be presented by the consultant for initial feedback after data collection and analysis. This process will assist the consultant to produce a draft and finalise the analysis of findings.

Output 3: Draft End of Strategy Evaluation Report

After the feedback meeting, consultant(s) should submit the draft end of strategy evaluation report to Oxfam in Southern Africa for review.

Output 4: Final Evaluation Report

The final evaluation report will be submitted after review of the first draft report by Oxfam in Southern Africa. The final evaluation report will include findings from data collection and analysis, lessons learned and recommendations for future programming and the strategy refresh.

Output 5: Submission of Reports and Final datasets

The consultant shall provide copies of each of the inception report, draft and final reports. All soft copies of the final data sets should be provided in common statistical package such as Excel and SPSS. The data will be owned by Oxfam.

Output 6: Updated Context Analysis for the Strategy refinement

The consultants will produce a detailed context analysis both at regional level and covering each thematic Pillar.

Output 7: SAF Cluster Program and Influencing Strategy

The Consultant will produce a SAF Cluster Program and Influencing Strategy document.

4. METHODOLOGY

The terminal evaluation of the SAF Cluster Strategy should follow a systematic, comprehensive, and tailored collaborative and participatory mixed methods approach that draws on both quantitative and qualitative data to address the evaluation questions. Consultant(s) should describe and justify data collection methods to be used throughout the evaluation and strategy refresh process. Data collection should include but not limited to the following.

- Literature review of available documents.
- Focus group discussions with relevant target groups
- Key informant interviews with key stakeholders and/or beneficiaries

Proposed sample design

- The total sample for the project areas should cover the four countries, Malawi, Mozambique, Zimbabwe and Zambia that the Cluster is covering.

Conducting the surveys

- Based on the sample frame, the consultant will develop plans for implementing the sample design.
- The consultant will have primary responsibility for field testing and piloting of the questionnaire.
- The consultant will be accountable for all field operations hence should include ethical considerations.

DURATION OF ASSIGNMENT

The consultant will collaborate with the Oxfam in Southern Africa, Policy Advocacy and Influencing Lead, Program Quality Lead, MEAL Officers, and Partner MEAL Assistants to define key deliverables and timelines. The end of programme evaluation of the SAF Cluster Strategy and refinement of the new strategy will be conducted over a period of 50 days. A detailed time schedule of various activities to be undertaken during the consultancy must be provided by the Consultant.

The key steps to be followed though not explicit and the detailed modality and work plan will be agreed during consultation meeting include:

Planned timeline

Activity / Milestone	Outputs or Deliverables	Estimated days	Timeline
(ex.			

5. DELIVERABLES AND PAYMENT SCHEDULE

Remuneration is based on submission of final deliverables according to the schedule below. The total available budget for this consultancy is **USD \$20,000**.

No.	Deliverables or Documents to be delivered	Estimated Dates	% Payment
1	DELIVERABLE 1: Inception report and data collection tools		[% total budget]
2	DELIVERABLE 2: Draft end of project evaluation report		[% total budget]
3	DELIVERABLE 3: Final evaluation report		[% total budget]
4	DELIVERABLE 4: SAF Cluster Program and Influencing Strategy		[% total budget]
TOTAL			100%

6. PROFILE REQUIREMENTS

The company/ individual(s) should have the following competencies:

Essential

- Postgraduate degree in Development Studies, Climate Change, Agriculture, Economics, Political Science, Monitoring and Evaluation, Social Sciences, Business administration or related fields.
- A minimum of 10 years of proven experience in conducting evaluations and demonstrated ability to produce high-quality research and deliverables within agreed timelines.
- Minimum 10 years proven experience developing advocacy/policy/influencing Strategy and plans. Skills in Strategic Communications will be an added advantage
- Minimum 10 years proven experience in developing organisational strategies.

- In-depth knowledge of NGO operations and the development landscape in Southern Africa for programmes in areas such as humanitarian action, gender justice, just economies, accountable governance and civic space.
- Strong analytical and conceptual capabilities to synthesize findings, develop practical recommendations, and prepare comprehensive reports.
- A solid reputation for independent work and adherence to ethical standards in research and evaluation.

Desirable

- Demonstrated experience aligning evaluations and strategy development with broader institutional frameworks.
- Proposals will be evaluated based on the quality of the technical and financial submissions, relevant experience, and qualifications of key personnel.

7. APPLICATION PROCESS

Submission deadline

Quotations and applications must reach Oxfam no later than 1st June 2025, 17: 00hrs CAT

Submission instructions

Responses must be submitted electronically to: Zimtenders@oxfam.org.uk

The subject of the mail should be:

[ToR Reference – End of Strategy Evaluation and Strategy Refresh + [Name of bidder]]

Clarifications

Any questions, remarks or requests for clarification can be sent up to 7 days before the submission deadline in writing. The (anonymised) questions will be answered to all applicants.

Administrative compliance

Responses must be submitted and prepared in English and received by the deadline.

To be shortlisted for evaluation against award criteria, the following documents must be included in the application:

Administrative Criteria		Importance
1	Technical proposal / approach paper to conduct the assignment and achieve objectives including methodology, proposed work plan and timelines	Mandatory
2	Financial offer (price quotation) including budget and pricing <ul style="list-style-type: none"> • All prices must appear in USD, with and without VAT (specify the VAT rate if applicable) • The total budget, which must include a detailed breakdown of costs by deliverables / day / working hours. • The total budget proposed by the Consultant must include all costs that will be invoiced to Oxfam in the financial offer¹: <ul style="list-style-type: none"> a) all technical services and activities e.g. research, report writing, analysis, instrument development costs; b) office related costs e.g. communications (phone), printing, IT costs (laptop), mail/courier; c) travel related costs (including flights, taxi, car, visas, vaccination, prophylaxis, accommodation, food); d) and travel to destination and from countries (economy class). <p>Please provide a detailed breakdown of your daily rate and the number of days and resources required per activity, as well as the associated cost.</p>	Mandatory
3	Curriculum Vitae(s) (CV) of the proposed consultant(s) , proving relevant experience and/or qualifications. If multiple people are involved, an outline of roles/ responsibilities also needs to be included.	Mandatory
4	Two relevant references (minimum) for previous comparable assignments	Mandatory

Administrative Criteria		Importance
5	Proof of registration: <i>The bidders also must include a copy of their registration at the relevant Chamber of Commerce and / or document showing self-employed tax registration.</i>	Mandatory
6	Evidence of previous work <ol style="list-style-type: none"> 1. Endline Evaluation report 2. Organisational Strategy 3. Context Analysis Report 4. Policy Advocacy Influencing Strategy 5. Any other documents proving similar experience and technical and thematic knowledge 	Mandatory

Evaluation and award criteria

Incomplete applications will not be assessed, only quotations that meet the administrative criteria will be assessed.

Award decisions will be based *on best value for money criteria covering both technical quality and price.*

The award criteria are assessed according to the following distribution of points:

Award Criteria		Max. points
Technical offer/ approach paper evaluation		
Experience/ competences	Demonstrated expertise and experience in conducting evaluations, developing advocacy/policy/influencing and organisational strategies for programmes in areas such as humanitarian action, gender justice, and just economies, accountable governance and civic space.	10
	Relevant experience with Oxfam	5
	Relevant experience with the NGO sector in southern Africa	6
	Positive references/reputation	5
	Relevance and quality of sample previous work, reporting etc.	5
	Knowledge of country, context	4
	Knowledge of team languages	2
	Clearly indicated alignment with Oxfam values	3
Technical quality	Quality of application: complete, good presentation and format, etc.	4
	Understanding of the assignment and the scope of the project	6
	Quality of the methodology, workplan and feasibility of the timeline (concrete and realistic)	7
	Quality and experience of staff resources assigned to the services + sufficient assigned resources (where relevant)	7
	Ability to lead/manage a team (where relevant)	6
TOTAL:		70
Financial offer		
Financial offer	Total cost of the offer, all services included (without added tax)	25
	Level of detail/ breakdown and clarity of the financial offer (fees, travel expenses, accommodation, etc.) Payment terms (max 30% in advance)	5
TOTAL:		30

Oxfam withholds the right to conduct interviews with one or more potential suppliers before an award decision is made. The purpose of the interview is to seek further clarification on the submitted quotations and learn more about the background and previous experiences of the potential suppliers and their teams.

8. OTHER CONDITIONS

Issuance of this Terms of Reference does not constitute an award commitment on the part of Oxfam, nor does it commit Oxfam to pay for costs incurred in the preparation and submission of a bid.

The attached Annexes are an integral part of this Request for Proposals – see section 13.

Oxfam may contact bidders to confirm contacts, addresses, bid amount and to confirm that the bid was submitted for this solicitation.

Quotation validity

- The quotation shall be valid for 90 days from the 1st of June 2025. If this is not possible, the bidder may propose a different timeframe.
- If the bidder is awarded the contract, all information provided in the quotation and negotiation process is contractually binding.

Right to Select/ Reject

Oxfam reserves the right to select and negotiate with those firms it determines, in its sole discretion, to be qualified for competitive proposals and to terminate negotiations without incurring any liability. Oxfam also reserves the right to reject any or all proposals received without explanation.

Reserved rights

All applications and quotes become the property of Oxfam, and Oxfam reserves the right in its sole discretion to:

- Disqualify any offer based on applicant's failure to follow solicitation instructions.
- Waive any deviations by the applicant from the requirements of this terms of reference that, in Oxfam's opinion, are considered immaterial defects requiring rejection or disqualification; or where such a waiver will promote increased competition.
- Extend the time for submission of responses after notification to all applicants.
- Terminate or modify the process at any time and re-issue the request for quotation to whomever Oxfam deems appropriate.
- Issue an award based on the initial evaluation of offers without discussion.
- Award only part of the activities in the solicitation or issue multiple awards based on solicitation activities.

9. CODE OF CONDUCT

Oxfam is committed to integrity in its operations and supply chains and ensuring high ethical standards. Complying with all laws and regulations and ensuring fair competition are fundamental to this commitment. We actively promote these principles and standards, and expect all Oxfam suppliers to demonstrate commitment towards them.

All consultants/applicant are required to agree and adhere to the [Oxfam Supplier Code of Conduct](#), whereas individuals (including consultants) must sign the [Oxfam Non Staff Code of Conduct](#)². These Codes of Conduct set out the specific standards and principles in the areas of human and labour rights, environmental impact and anti-corruption that suppliers must follow.

Oxfam has the following requirements of its service providers, to ensure integrity in its supply chain:

Bribery and collusion

Oxfam does not tolerate fraud, including bribery or kickbacks, collusion among bidders, bribery or kickbacks. Any firm or individual violating these standards will be disqualified from this procurement and barred from future procurement opportunities.

Employees and representatives of Oxfam are strictly prohibited from asking for or accepting any money, fee, commission, credit, gift, gratuity, object of value or compensation from current or potential vendors or suppliers in exchange or as a reward for business.

False statements

Bidders must provide full, accurate and complete information as required by this solicitation and Annexes. False statements in bids constitutes grounds for immediate termination of any agreement with the supplier. OXFAM takes

² Non-Staff Code of Conduct applies for any self-employed individuals or contracted employees of suppliers who are working on Oxfam sites, or who have access to Oxfam materials, or who may represent Oxfam in any manner but are not part of Oxfam's legal entity)

misstatements, falsification, manipulation, alteration of facts and/or documents very seriously, has a zero-tolerance policy to such behaviours, and may choose to take legal action in a case of misrepresented disclosures by

Conflict of interest

Bidders must provide disclosure of any past, present or future relationships with any parties associated with the issuance, review or management of this solicitation and anticipated award. Failure to provide full and open disclosure may result in Oxfam having to re-evaluate the selection of a potential bidder.

Diversion of funds

Oxfam is determined that all its funds and resources should only be used to further its mission and shall not be subject to illicit use by any third party nor used or abused for any illicit purpose. Suppliers (and their affiliates/group companies, employees, officers, owners, agents and sub-contractors) may be subject to formal screening against global lists of individuals subject to designation or proscription under financial sanctions or counter terrorism regulations.

10. Monitoring

Due diligence: As a charitable organisation, Oxfam must take care to protect its assets and funds, as well as the communities that we work with. One of the steps that Oxfam takes to comply with this legal duty is to conduct adequate and proportionate due diligence on suppliers prior to entering into a contract. This includes checking legal registration and financial solvency, but may also include other checks, such as misconduct/performance reference checks and if working with children or vulnerable adults, a criminal records check.

Important note: Oxfam performs a regular screening check of all suppliers against international sanctions lists.

Audit : Any audit requirements are detailed in the terms and conditions of business




Data protection : Oxfam is legally bound to ensure that all personal details held by the organisation relating to any individual or entity are kept secure and according to international data protection standards.

11. MISCONDUCT REPORTING AND WHISTLEBLOWING

Oxfam's reporting and whistleblowing mechanisms are available for Service Providers as well Oxfam employees, to ensure that Oxfam continues to operate under the highest ethical standards and principles.

You can use these reporting channels confidentially, anonymously, and in your own language to report any concerns involving fraud, corruption, waste, abuse or safeguarding concerns.



Speak up			
	Oxfam GB	Oxfam Novib	Oxfam Intermón
Email: 	SpeakUp@oxfam.org.uk	integrity@oxfamnovib.nl	buzon.etico@oxfam.org
Online: 	Oxfam Misconduct Reporting Webform (including possibility for anonymous reporting) https://oxfam.clue-webforms.co.uk/webform/misconduct/		
Phone: 	Global phone number: +44 1249 661808 Check https://speakup.oxfamnovib.nl for local numbers (you can request interpretation)		

12. ANNEXES

- Oxfam Supplier Code of Conduct: <https://oxfam.box.com/v/Oxfam-Supplier-CodeConduct>
- Oxfam Non-Staff Code of Conduct: <https://oxfam.box.com/v/Nonstaff-CodeConduct>
- Conflict of interest declaration form: <https://oxfam.box.com/v/Supplier-COI-declaration>
- [Safeguarding policy](#)
- (If applicable) [Oxfam child safeguarding policy](#)
- (Edit if applicable) Example privacy notice : <https://oxfam.box.com/s/mo8artt9l8a2x0cnpqrqqrugt8k0r773>