

An evaluation of JRCT's Power and Accountability Programme 2014-20 and proposals for future directions

Terms of Reference

THE
JOSEPH
ROWNTREE
CHARITABLE
TRUST



Background

The Joseph Rowntree Charitable Trust (JRCT) has a long-standing interest in power and accountability issues. In keeping with the Quaker values of the Trust, our vision is a world in which power is more equally shared, and in which powerful institutions are responsive and accountable to wider society and aligned with the long-term public interest, considering those most disadvantaged by the system currently.

In 2014, the Trust established its Power and Accountability Programme – with the aims of strengthening democratic accountability, corporate accountability and encouraging a responsible media. We work towards a number of objectives in these three areas as set out in our latest [grants policy](#) and explained in brief below.

On corporate accountability we support work which:

- develops and promotes mechanisms which increase the accountability and responsiveness of companies to shareholders, stakeholders, regulators and the long-term public interest, for example through improvements to corporate governance, corporate structures (including alternative corporate forms), company reporting or regulation
- develops and promotes mechanisms whereby those who suffer severely as a result of company actions, particularly marginalised groups, can gain access to justice.

On democratic accountability we support work which:

- develops and promotes mechanisms which ensure an accountable, transparent and proportionate relationship between the private sector and government
- develops and promotes mechanisms which enable civil society and the general public, including marginalised groups, to engage appropriately and effectively with government policy making
- encourages government, parliament and other statutory agencies to be more representative of the wider public they serve.

On responsible media we support work which:

- encourages accurate and responsible media, with appropriate safeguards
- explores and promotes ways for all forms of media to play a constructive role in holding government, companies and other powerful actors to account.

In 2020 we updated our policy and introduced a greater focus on digital technology as a cross-cutting concern. We also fund some cross-cutting work linked with our [other funding priorities](#). Our approach in the programme, as across JRCT as a whole, is to tackle the root causes of a problem – the structures, systems, and power imbalances that create injustice or reduce accountability in corporations, the media

and our democracy, especially affecting those who are most marginalised and disadvantaged.

Our model is a responsive one, and we fund a broad range of approaches. We support work that: holds government, companies and the media to account; advocates for policy and legislative change; builds power and voice within communities, and grows wider public support for the issues at hand. We are willing to take the long view. The programme focuses on work at a national level, as well as some pan-European work.

Our annual spend since the programme began in 2014 has increased from around £1 million a year to just over £2 million in 2019. The current programme portfolio includes 45 grantees across our three themes and related cross cutting grants. Our [grant-making](#) involves review of applications by the programme lead and a grant-making Committee of seven members, including four trustees and three co-opted members who bring thematic expertise. Final decisions are taken by JRCT's Board.

Overall purpose and aims

The purpose of this evaluation is to identify what has been learnt over the past six years of grant-making in the Power and Accountability Programme, both to consider how well JRCT's overall approach is enabling us to address the agenda, and to inform our assumptions about change and priorities going forward.

The main aims are to:

1. provide an overview and improve our understanding of the collective impact and key achievements associated with our grants/ grantees' work across the three themes of our programme and how our funding has supported systemic change and strengthened capacity in the field
2. gather sector insights and learning about how to best achieve change in our fields of work to address unequal power and increase accountability and comment on our funding reach in the fields in which we fund
3. explore changes in the external context and their implications for our funding policy, considering our aims, focus and approach to grant-making and the range of groups that we fund
4. draw out the implications for future directions for the Power and Accountability Committee and ways in which we could be more effective.

The evaluation is intended to help us to improve our grant-making and strengthen understanding within the committee about where and how change may come about in a challenging context and the ways in which we can make a difference. It should help the Power and Accountability Committee to reflect on the following questions:

- How do we understand the challenges that the programme is addressing?
- What are our collective assumptions about change?
- How does our funding approach compare with the work of other funders in the field and what contribution does it make?
- How has JRCT's funding contributed to strengthening capacity across the areas of the programme?
- How broad has our funding reach been in relation to the potential field?
- What impacts have our grants/ grantees had overall, including in supporting systemic change?

- What have been the main achievements across our themes of work?
- Where has progress been more difficult to achieve?
- What collective learning can we gather about addressing inequities in power and accountability across our fields of interest?
- What more could we do to advance our concerns and support grantees?
- What is working well/less well in our programme and funding approach?
- Where are we most needed? Are there critical gaps/areas needing less focus?
- Are there new actors, approaches and audiences we need to consider? Is there evidence of emerging movement building in need of support?
- What future directions should we consider in our programme?
- What are the pros and cons of continuing to offer funding at European level for pan-European work?

Information available from the Trust

Within our programme, we collect annual statistics on our grant-making and receive annual progress reports and closing reports on each grant from those we fund. Grant officers aim to meet all grantees once a year to discuss progress, challenges and learning. Each programme committee receives an annual report to reflect on the context for the programme and what this means for the grant policy. Relevant data can be made available to the successful applicant.

Supporting programme wide learning

Much of our learning is at the individual grantee level. This evaluation is intended to help us to take stock of programme level learning and to make recommendations for any adjustments to the programme as a whole. The programme currently covers a very broad, diverse set of issues; we are interested in how well this works in practice. Whilst we remain a long-term, responsive funder, we are keen to take account of changes in the external context and to be mindful of opportunities for impact. We are therefore interested in the implications of the evaluation for future directions in our funding in light of barriers to, and opportunities for, influence.

Audience

The review audience is the Power and Accountability Committee. The evaluation will be shared within the Trust and may also be published and shared more widely.

Methodology

It is anticipated that the evaluation will require:

- Analysis of grants made and annual statistics collected under the Power and Accountability Programme
- Exploring changes and new directions in the external context relating to the programme themes
- Review of discussions at the Committee, reflected in Committee minutes
- Engagement with a selection of grantees and other key stakeholders (potentially including funders in the field or target audiences)
- Engagement with members of the Power and Accountability Committee, trustees, co-optees and staff.

Our suggestion is for a two-stage approach to include both a retrospective review of the effectiveness of our grant-making and a forward look at future directions. We

encourage applicants to engage stakeholders to inform both phases and to set out their approach, including plans for interviews/focus groups in their submissions.

Timeframe

We anticipate a 6 month timeframe. The study should commence by the end of October 2020, with the final report due by the end of April 2021.

Process and delivery requirements

Stage in process	Timeline
Application deadline	Monday 28 September 2020, 9.00 am
Shortlisted applicant interviews	Tuesday 13 October
Notification of decisions	By Friday 23 October
Inception meeting	Early November (date tbc with contractor)
Progress report and short presentation to Power and Accountability Committee	February 2021 (provisionally 4 Feb)
Final report	By end of April 2021
We may also request a presentation of final findings and recommendations to Power and Accountability Committee	June 2021 (provisionally 10 June)

We expect the consultant to work closely with JRCT's programme lead throughout the evaluation and are keen for this to be a collaborative process. We would like to learn from informal evidence captured through visits, conversations, and observations and for the evaluator to act as a critical friend. We do not expect that grantees will require resources to engage with the evaluation but applicants should consider this in their approach and include any provision in their budget if needed.

Budget

Please provide an overall budget, including daily rate and number of days required per team member, and any other costs, including expenses related to travel and subsistence or engagement activities as needed. We anticipate an indicative range would be £20-25k but will be keen to see value for money in the approach.

Liaison

The consultant's primary point of contact and support will be Katharine Knox, JRCT's lead for the Power and Accountability Programme.

Assessment criteria

We are looking for the following from the successful applicant:

1. Skills, experience and knowledge of evaluating funding programmes in the voluntary sector, including relevant techniques for evaluating impact
2. Knowledge/experience relating to the power and accountability agenda (democratic accountability, corporate accountability, responsible media)
3. Experience working with trusts/foundations in an advisory capacity
4. Clear, feasible and robust research methods in response to the brief to cover both retrospective learning and a forward look on strategic directions

5. Qualitative research skills for interviews/focus groups, facilitation, data collection, analysis
6. Interpersonal and communication skills to build trust and rapport, and for listening, questioning, communicating learning with key audiences
7. Project and risk management
8. Value for money.

Requirements for submitting a proposal

Applicants are invited to submit a proposal which sets out their response to the brief, taking account of the assessment criteria above and covering:

- Overall approach to the project, including methods and plans for delivery in response to this brief (detailing interviews/focus groups etc)
- Team details including names, roles and responsibilities for all members, brief CVs and overall plans for project and risk management
- Relevant expertise, track record and credentials for delivering this project
- Knowledge of the subject areas of the power and accountability grants programme
- Experience of conducting evaluations and assessing impact in a grant funding context
- Timeline and budget (including breakdown of number of days per person, day rates and any other associated costs e.g. for engagement).
- Contact details of two referees
- An example of written work as a hyperlink.

The maximum length of proposals, including short CVs, should be no more than 8-10 A4 pages. We suggest CVs focus on relevant expertise and are confined to one page per team member.

We are open to proposals from consortia of organisations or individual consultants where clear roles are set out.

Proposals should be emailed to Katharine Knox – katharine.knox@jrct.org.uk by **Monday 28 September, 9.00am** including the subject line *Power and Accountability Programme Evaluation*.

Please contact Katharine Knox with any queries.