

Valuing the Ocean Phase Two: brief for an evaluation and learning partner

Introduction

The purpose of the UK Branch of the Calouste Gulbenkian Foundation is to bring about long-term improvements in wellbeing particularly for the most vulnerable, by creating connections across boundaries (national borders, communities, disciplines and sectors) which deliver social, cultural and environmental value. We aspire to be outcomes orientated and to ensure that our support leaves a legacy in policy and practice, placing a significant emphasis on learning from the work we do and communicating it to those with the ability to create positive change.

Valuing the Ocean is one of the three main strands of the UK Branch's work. The strand focuses on increasing collaboration and NGO capacity to communicate the value of the ocean (why the ocean 'matters') more effectively. Our hypothesis for the strand is twofold, that:

- we need an ecosystem of organisations with different skills working together to influence systemic change; and that
- developing capacity and skills to communicate the value of the ocean to people in new ways will help to foster a culture in which better decisions are made about the ocean's management and protection for the long term.

We now want to commission a learning partner or 'critical friend' for Phase Two (2018-19) of the programme. We are keen to take a flexible approach to learning and evaluation, building on lessons from Phase One. We seek an external learning partner (a 'critical friend') who can support us in the implementation of a learning framework developed in-house. The ideal partner will have the experience and skills to support the needs of projects delivering complex 'system change' initiatives and our own need to understand the outcomes of our work.

Background: Valuing the Ocean Phase One

In 2014, we developed a strategy for the strand which set out three high level outcomes:

- an identified set of 'change-makers' with the drive to make significant impact;
- new platforms for collaboration across sectors and for improved knowledge flows;
- a demonstrable increase in environmental organisations' capacity to protect the ocean.

Valuing the Ocean also aimed to support and complement the work of the [Gulbenkian Oceans Initiative](#) (GOI), which ran from 2013-17, managed by colleagues in Portugal. The GOI explored the economic value of the natural services that the ocean provides to improve scientific knowledge and public and political perception of the benefits of marine and coastal ecosystems.

In Phase One of Valuing the Ocean, we have:

- **built connections and collaboration with the Gulbenkian Oceans Initiative;**
- **established the Marine CoLABoration**, a group of nine NGOs working together on flagship projects;
- **commissioned new framing research** into how the UK public thinks about the ocean;
- **and supported a number of other projects**, which test new approaches and/or seek to strengthen collaboration.

See Appendix I for further information on the programme and initiatives.

In 2017, an independent evaluation of Phase One assessed achievements so far and made recommendations for Phase Two. It identified promising results to date but advised a focus on more defined impact and capacity building in Phase Two.

**‘VALUING THE OCEAN’ HAS PROMISING RESULTS TO DATE,
ESTABLISHING THE FOUNDATIONS FOR SIGNIFICANT IMPACT**

Initiative	Outcomes so far
Getting below the Surface: FrameWorks research	Strong interest from the sector in the findings: identifies gap between how NGOs and scientists communicate and what the public thinks
Marine CoLABoration group of nine NGOs	<i>‘Exceptional levels of trust and commitment to collaborate’</i> inspiring innovation, organisational change and ecosystem of fresh approaches
Community Voice Method stakeholder engagement	Marine management measures agreed and implemented with wide local support; marine NGO shapes strategy around <u>benefits to people</u>
Blue New Deal: Good jobs for coastal communities through healthy seas	Nationwide network of 800+ organisations and individuals taking <i>Turning Back to the Sea</i> action plan forward; cross-party political champions; establishing a new Centre for Coastal Economies
Common Seas: Ocean Friendly Design Forum	Cross-sector group catalysing circular economy solutions to plastic pollution; engaging with Pepsi and Coke; supported by Prince Charles

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Valuing the Ocean Phase Two

Phase Two will concentrate on spreading and embedding our work, with a continuing focus on communication and collaboration.

NOW TARGETED INTERVENTIONS TO SPREAD INNOVATION WILL STRENGTHEN HOW NGOS COMMUNICATE THE VALUE OF THE OCEAN

Now	...we will embed new approaches...	...to secure sustainable change
New FrameWorks research will	<ul style="list-style-type: none"> develop and test frames and messages and train NGOs to use them 	<ul style="list-style-type: none"> to unify and empower NGOs with a compelling story of the ocean’s value
The CoLAB community will	<ul style="list-style-type: none"> spread new approach across networks evidence impact of comms innovation scale #OneLess and Agents of Change develop ocean literacy in the UK 	<ul style="list-style-type: none"> to build skills and collaboration to increase investment in what works to influence attitudes and behaviour to shape knowledge and connections
MCS will	<ul style="list-style-type: none"> seek to replicate CVM nationally 	<ul style="list-style-type: none"> to improve marine management plans
NEF will	<ul style="list-style-type: none"> set up a Centre for Coastal Economies 	<ul style="list-style-type: none"> to build sustainable local economies
UKB will	<ul style="list-style-type: none"> strengthen policy and funder networks 	<ul style="list-style-type: none"> to secure impact and investment

By 2021 more people in the UK will know their wellbeing and prosperity depend on a healthy ocean and support actions to protect it.

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Learning and evaluation for system change

Securing systemic change is usually a complex, long-term process, non-linear and difficult to attribute to individual organisations or initiatives. Clear and reliable measures of progress over the short term are hard to come by so finding effective and appropriate approaches for assessing programmes which aim for systemic change isn't easy.

Leading proponents of system change programmes talk about *learning* rather than *evaluation*. Their focus is on asking the right questions to interrogate the work they support to understand what is and is not working and why. Questions are co-developed with partners and learning shared and used to shape new work. This is an action-learning approach, which seeks to be flexible, light touch and responsive to the needs of the partners they support. In practice, learning frameworks can still be clunky and the evidence-gathering responsibilities for partners onerous. However, the purpose of learning is to improve the work rather than evidence impact.

At the UK Branch, CGF has been moving towards an action-research learning approach for some time now. Our strands have developed key questions that we seek to answer. At the same time, it remains critical for us to understand the progress, outcomes and effectiveness of our work.

The commission

We propose a responsive approach for Phase Two, using a learning framework developed in-house, with support from a 'critical friend', an external learning partner who appreciates the needs of system change projects, but can bring an independent eye to the process. The approach will be underpinned by work which can help us understand baseline change and supplemented by an annual learning day across the programme. The learning partner will work closely with CGF staff, and in cooperation with one or two other key partners.

We seek to commission a learning partner for Phase Two to help us:

1. implement a flexible but effective process;
2. understand what progress has been made;
3. support our partners in learning from, improving and evidencing the value of their work;
4. consider how we can secure significant and sustained positive change over the duration of our funding and as we plan for legacy; and
5. reflect on the structure and approach of the strand in its goal to enabling system change – and identify lessons which might be applied to our work in other strands going forward.

This commission will generate the following products:

- a review of the theory of change and learning framework we have developed and the kinds of evidence partners are generating;
- participation in an annual learning day in 2018 and 2019;
- two short accessible progress reports;
- a short accessible final draft report (no more than 20 sides of A4) structured to reflect the main findings and a summary of learning (which may include more detailed information and analysis in annexes);
- internal presentation of a draft Phase Two report and then a final report (with an executive summary of no more than 4 sides of A4 and a Powerpoint presentation).

The process – including timetable and costs

Timetable and costs

Progress reports will need to be completed by the ends of December 2018 and June 2019. A final report by the end of January 2020.

There is a budget of up to £40,000 available for this work including costs, expenses and VAT.

Commissioning process

If you would like to undertake this commission, please respond by email with a full proposal and costings by **Friday 13 April**. Shortlisted candidates will be notified on Tuesday 17 April and **interviews** will be held on the **afternoon of Thursday 19 April** or **morning of Friday 20 April**.

Proposals should include or demonstrate:

Full details of the proposer: This should include a CV with email addresses, telephone numbers and postal address, and references to previous work holding a learning and evaluation role.

Context: An understanding of the context for this work.

Some understanding of system change and action research approaches: Outline previous work of this type you have undertaken and any theoretical basis for your approach.

Research design, methods and analysis: Please state clearly the methods to be adopted and why they are appropriate, citing any relevant research or other experience you have. Please provide as much detail as possible about how you propose to work with CGF to collect data and analyse it and the issues and challenges this may pose (ethics, quality etc).

Timetable: Please provide an outline schedule setting out the elements of the work to be undertaken in this study, the personnel involved and the fee per day.

Costs: Detail the full costs for the approach you propose.

Please also provide us with one or two examples of reports or summaries of previous relevant projects you have undertaken and the names and contact details of two referees willing to attest to the quality of your work and your ability to meet deadlines.

The criteria for assessing proposals will be:

- experience in similar contexts, approach, and learning and evaluation methodologies;
- some understanding of the subject area;
- the strength of the proposed approach (rigour, appropriateness, practicality);
- an interest in and willingness to experiment with collaborative approaches;
- likely positive contribution to our learning and that of the projects we support;
- the value for money provided by the proposal.

Please contact Louisa Hooper at lhooper@gulbenkian.org.uk for further information or to arrange an informal discussion about the commission.

Other documents available on request:

Valuing the Ocean 2017 strategy slide deck
Marine CoLAB 2017 strategy slide deck
Valuing the Ocean learning questions and theory of change
Phase One Evaluation Summary
List of projects supported under Phase Two

Appendix I: Valuing the Ocean

Environment funding at the CGF UK Branch is focused on the **marine environment**.

The work is experimental. Our **hypothesis** is that developing skills to **communicate the value of the ocean** to people in new ways will help to foster a culture in which better decisions are made about the ocean's management and protection for the long term.

The UK Branch has worked closely with the **Gulbenkian Oceans Initiative (GOI) in Lisbon**. This was a five-year programme exploring the economic valuation of **marine natural capital**, which ended in 2017. It was also working with Portuguese environmental NGOs to build collaboration and capacity to influence. From 2018 the GOI is replaced by a new five-year **Sustainability** programme. This has two strands of work: **Intergenerational Justice** and **Sustainable Production and Consumption**.

Key themes the UK Branch is exploring in our work include:

Prosperity and wellbeing: We all benefit from a healthy and sustainably managed ocean. The ocean's healthy functioning and resources are fundamental to life itself and support our health, wellbeing and prosperity. Healthy, sustainably managed seas support prosperous economies, businesses and coastal communities.

Promoting positive values: Promoting shared values and new narratives for marine conservation will create change. We value economic prosperity, but also a broad range of other things. We protect what we value. Uncovering and reflecting the multiple values of the ocean and humankind will lead to better and faster ocean conservation.

Increasing collaboration and the effectiveness of environmental NGOs: CGF supports NGO sectors in Portugal and the UK to build capacity, skills and sustainability for long-term effectiveness.

Key initiatives include:

The Marine CoLABoration: In 2015, CGF established the [Marine CoLABoration](#) group, nine organisations brought together to explore how to communicate the value of the ocean more effectively. The Marine CoLAB aims to increase the impact and effectiveness of ocean solutions through a **'values based' approach**. *CoLAB partners design experiments which test the hypothesis that developing a shared appreciation of the value of the ocean in all its forms will deliver better outcomes for people and planet.*

Initiatives include: **Agents of Change**, a project to empower new voices for marine conservation in coastal communities; the [#OneLess bottle campaign](#) to transform London into a city free of single use plastic water bottles by 2021; and **Ocean Literacy** innovation.

Research into public understanding of marine issues: CGF commissioned research from the FrameWorks Institute into how the UK public thinks about the ocean. [Getting below the surface](#) maps the gaps between expert and public understandings of the ocean and marine conservation, providing insight into more and less effective ways of framing the issues. The FrameWorks Institute is now developing and testing new frames and metaphors, informed by the research.

The New Economics Foundation Centre for Coastal Economies: NEF has developed a Blue New Deal strategy: a new vision for coastal communities that delivers good jobs and economic prosperity, underpinned by healthy seas. A nationwide cross-sectoral network supports these aims. Through its Centre for Coastal Economies, it is now piloting approaches to connect and catalyse community-led innovation and the national policies needed for coastal communities to flourish.

Community Voice Method: spreading effective participatory processes: The Marine Conservation Society has piloted the Community Voice Method (CVM) with IFCA's (Inshore Fisheries and Conservation Agencies) in East Anglia and on the south coast to help in the development of management measures for marine areas. CVM uses film in an in-depth participatory process which reflects the range of views across an issue. It has proved effective at building consensus and MCS is developing plans to promote its use mo