

# Terms of Reference for an External Review of Trócaire's Campaigns Programme

## **Summary :**

*Trócaire seeks an external consultant to undertake an external review of our public advocacy campaigning programme. The primary function of Trócaire's public campaigning is bringing about change in Irish or international policy through mobilising campaigners and volunteers to put pressure on political targets. The purpose of the external review is to assess the strategic and tactical approach of Trócaire's Campaigns Programme and ensure it is informed by best practice and cutting-edge thinking. The consultant will assess the effectiveness of approaches used in public campaigning and make recommendations with respect to future public campaigns work. This review will analyse and review approaches and tactics used towards online and offline campaigning, compared with peers in our sector, established best practice, and emerging innovative approaches.*

**Intended number of days :** 10-15 days

**Application deadline :** 19<sup>th</sup> January 2024

## **1. Profile of Trócaire**

Trócaire is an overseas development agency based in Ireland and works in partnership with communities in over 20 countries to relieve poverty and tackle injustice. Trócaire does this thanks to the support of people all over Ireland, as well as with the help of its institutional partners. More information about Trócaire can be found on <http://www.trocaire.org/>.

## **2. Trócaire's Campaign Programme**

The primary function of Trócaire's public campaigning is to mobilise the Irish public in support of bringing about change in Irish or international policy. We mobilise **campaigners and volunteers** to take action to put pressure on political targets, particularly timed at key tactical moments, focused on key local constituencies of strategic political targets.

### **Campaigns Strategy Vision (2021 – 2024):**

In Ireland, Trócaire is seen as a leader in advocacy campaigning that delivers positive policy change. Using the highest quality resources, rooted in the authentic experience of communities, we inspire our growing supporter base of active global citizens to act for justice and influence policy change on Trocaire's priority issues.

### **Ambition:**

- We are winning campaigns on Trócaire's priority advocacy issues, by putting pressure on duty bearers, using our constituency level campaigning approach, in Ireland, Northern Ireland, the UK, the EU and internationally.

- We are strategically networked and work with diverse and like-minded organisations to build a dynamic community of change who share in Trócaire’s values.
- We are leaders in the production of innovative, creative, arresting resources which inspire our audiences to act.

### **Campaigns Programme Strategic Objectives**

1. We will inspire our audiences to take action on our priority campaigns through innovative (primarily) online outreach, then moving to a blended approach to outreach post Covid restrictions.
2. We will produce high quality, creative and effective digital resources that are adaptable to offline outreach.
3. Working with the Policy Team, volunteers and networks as required, we will further embed our constituency based campaigning approach in both jurisdictions (ROI + NI), to influence the knowledge, opinions and actions of our political targets to achieve the objectives of our priority campaigns.
4. We will measure, evaluate, adapt and learn within the Campaigns Team programme to have more impact.
5. We will work as an agile, empowered and accountable team to deliver on our objectives.

### **Examples of tactics used to bring about change:**

- Developing outreach resources (e.g. photo exhibitions, documentaries, experiential installations) that are used across Ireland at events organised by Trócaire, by volunteers, or by other networks and multipliers groups (such as third level institutions, community groups, parishes etc.)
- Digital Campaigning : online e-actions, email campaigns, social media actions (using accessible and engaging content such as photo, animations, short video & infographics)
- Constituency based campaign actions : e.g. letter writing, petitions, postcard actions, face to face lobby meetings with campaigners and politicians, posting unusual items to get political target’s attention (craftivism, fake movie posters etc.) in strategically chosen constituencies.
- Developing creative content that incorporates humour, satire, etc.
- Bringing volunteers to UN negotiations in Geneva
- High impact and creative media stunts and photo-calls
- Tactically timed opinion pieces to create a debate around the need for political action
- Building relationships with campaign ambassadors / celebrities / social influencers to support the campaign, bringing them on media trips
- Using the arts for engagement (poetry, installations, theatre, festivals, Culture Night)
- Partner speaking tours in Ireland
- Delivering tailored training to volunteers regionally

### **3. Expected Outputs**

- **Written report** (electronic copy). The core report should not be more than 10 pages (excluding appendices). A format for the report will be agreed jointly during the initial phase of the consultancy.
- **Half-day workshop with Trócaire staff** : presenting the report and co-facilitating a discussion with key Trócaire staff on the findings and recommendations.

## 4. External Review Objective

The purpose of the external review is to assess the strategic and tactical approach of Trócaire's Campaigns Programme and ensure it is informed by best practice and cutting-edge thinking. The consultant will assess the effectiveness of approaches used in public campaigning (guided by the campaigns strategy 2021-2024) and make recommendations with respect to future public campaigns work, particularly in the context of limited team resources.

This review is *not intended* to evaluate the impact of specific campaigns actions over a time-period, but rather is to analyse and review our approaches and tactics used towards online and offline campaigning, compared with peers in our sector, established best practice, and emerging innovative approaches. It is a review of the '**how** we approach campaigning' rather than 'what have we achieved' or 'why should we campaign on a certain issue' or 'who we should work with'.

## 5. Proposed Methodology

Areas to be explored:

1. **Review our overall strategic approach to public campaigning:**
  - Is our approach to campaigning fit for purpose? Still appropriate?
2. **Assess the effectiveness of our campaigning tactics and tools :**
  - Are we using the appropriate campaigning approaches and tactics for our strategic campaign objectives?
  - What is current best practice regarding bringing campaigners on a journey from clicktivism to deeper activism?
  - How might we evolve our online digital campaigning with ever decreasing attention spans on social media platforms?
  - How might we strengthen and deepen our offline face-to-face campaigning approaches, with our own volunteers and with multipliers, networks and climate activist groups?
  - Are our peers (e.g. professional NGOs using a similar tone of voice engaged both in policy influencing and public advocacy with a campaigning dimension) using approaches we could learn from? What level of resourcing (staff and operational budget) are our peers using to achieve impact?
  - Is there an evidence base for exploring new tactics or refining our approaches? Are there opportunities to pilot new and innovative ways of getting the attention of decision makers beyond our standard tools of media stunts, online e-actions, petitions, postcards, letter writing and phone calls to politicians? Where is the cutting edge at present for our peer organisations?
  - Is there best practice which can guide us in refining and deepening our approach to constituency based campaigning?
3. **Review our horizon scanning exercise:**
  - Are there key coming shifts we need to be aware of? What are our blind spots?

It would be anticipated that these review questions would be explored largely through:

1. Desk review of Trócaire documents,
2. Desk review of existing literature and evidence base available publicly,
3. Interviews with key Trócaire staff,
4. Interviews with key external experts (e.g)

- a. From peer organisations : e.g. Oxfam, Amnesty, Action Aid, Uplift, Friends of the Earth, Sadaka
- b. Political targets – to challenge our assumptions on what works to get their attention and what forms of public pressure influences them. (1 or 2 open and sympathetic TDs may be amenable to this)
- c. Academics
- d. Other influential and impactful campaigning groups outside our sector / bubble, e.g. business lobby groups, farmers groups etc.

It would be important to bear in mind while the context of campaigning in Ireland (both in ROI and NI) is key, we also want to be open to learning from cutting edge approaches used in other jurisdictions globally.

## **6. Organisation of the Review**

It is expected that there will be a number of phases to the review process to include:

### Phase one: Orientation and design

- This phase will involve initial review of documents and reports, and design of the methodology for the review;
- Agreement of plan and methodology with Trócaire;

### Phase two: Data synthesis and collection

- Review of existing documents and public sources;
- Data collection from external stakeholders in line with the agreed plan and methodology.

### Phase three: Data analysis and reporting

- Analysing data from synthesis and collection;
- Drafting report, receiving comments, finalising report;

### Phase four:

- Sharing findings with Trócaire in a half day workshop;

## **7. Management of the Review**

Overall management of the external review lies with Trócaire's Campaigns and Digital Outreach Manager. The consultant is expected to undertake the review as outlined briefly above, and will have ongoing engagement with the Campaigns and Digital Outreach Manager throughout the process.

The Campaigns and Digital Outreach Manager is responsible for:

- Overall responsibility and accountability of the review
- Liaison and support for the consultant throughout all phases of the review
- Approval of deliverables
- Coordination of Trócaire's internal processes

The consultant is responsible for:

- Conducting an objective review
- Day-to-day management of operations

- Regular process reporting to Trócaire
- The production of deliverables

## **8. Consultant Profile**

Essential qualifications:

- Conducting strategic reviews in the areas of public advocacy and campaigning in the Irish context;
- Proven experience of using participatory methodologies as a means of data collection for reviews and evaluations;
- Proficiency in data analysis, documentation and report writing;
- Excellent spoken and written communication skills in English;
- Excellent skills in public campaigning, communications and advocacy analysis, and other change influencing processes;
- Strong interpersonal and analytical skills;
- Strong knowledge of the Irish political system and the EU and UK contexts;

## **9. Proposed timeline for the exercise:**

January 2024	–	Orientation and design,
February 2024	–	Data synthesis and collection,
	–	Data analysis and reporting,
March 2024	–	First draft submitted (1 <sup>st</sup> March),
	–	Final version submitted (29 <sup>th</sup> March),
April 2024	–	Presentation of report to Trócaire.

**We anticipate this exercise to take 10 - 15 days** and the agreed methodology should be appropriate to this duration.

## **10. Application Process:**

- Please provide an ‘Expression of Interest’ including outline of how to approach work and proposed number of days and costings including VAT (Max 2 pages).
- The proposed costing should include:
  - Consultancy fees. Trócaire are not VAT registered and any chargeable VAT and other taxes should be included in the offer.
  - Expenses including flights, other transport, accommodation, etc.
  - The proposal should indicate the period for which prices and terms quoted will remain valid.
- Please include links to samples of past work that is similar in content or style to the above outputs;
- Please include CV.

**Application deadline: 19<sup>th</sup> January 2024**

Your application marked “Campaign Review Consultant” should be submitted to

[garry.walsh@trocaire.org](mailto:garry.walsh@trocaire.org)

## **Confidentiality**

Trócaire will treat the content of all tenders as being confidential and information provided in the tenders will be used solely for the purpose of deciding on the award of a contract as described in this document.

## **General Terms and Conditions**

- Trócaire does not bind itself to accept the lowest priced tender;
- Trócaire reserves the right to engage other companies / consultants if required during the term of the contract;
- Trócaire shall be free to:
  - To accept the whole, or part only, of any tender;
  - To accept none of the proposals tendered;
  - To republish this Request for Tenders.
- In the event of not accepting any of the proposals received on foot of this Request for Tenders, Trócaire shall be free to make such arrangements as it considers necessary in relation to the provision of the services;
- Trócaire will not be liable for any costs or expenses incurred in the preparation of a tender;
- The tenderers shall maintain strict confidentiality in relation to the services being sought and the tendering process;
- The Contract shall be considered as a contract made in Ireland;
- The Standard Terms and Conditions to which Trócaire expects all of its supplier to respect are attached in Appendix 1;
- The Suppliers Code of Conduct to which Trócaire expects all of its suppliers and service providers to respect is attached in Appendix 2.

## **Conflicts of interest**

- Any conflicts interest involving an applicant must be fully disclosed to Trócaire. Failure to disclose a conflict may disqualify an applicant or invalidate an award of the contract. Applicants are required to declare any current or past work which might reasonably be considered to represent a conflict of interest. It will be for Trócaire to decide if a material conflict of interest exists and applicants in doubt in this regard should seek the advice of Trócaire.
- Advice provided to Trócaire must be accompanied by a statement that there is no conflict of interest involving the applicant. In the event where there is a conflict, Trócaire reserves the right to retain another firm of solicitors to provide the advice, for that issue alone.

## **Intellectual Property**

Any concept, guidelines or other material developed during the contract will be considered the property of Trócaire and may be used by Trócaire at any time.

## **Termination of Contract**

- Trócaire reserves the right to terminate the contract at any stage on payment of reasonable and agreed costs accrued to the date of termination. The contract may be terminated by either party on giving one month's written notice or a shorter notice period if both parties agree.
- If at any stage during the contract, the work being undertaken by the tenderer is found to be unsatisfactory, the contract may be terminated by Trócaire. In the event of such a termination, the tenderer will only be entitled to receive payment in relation to the acceptable work done. The computation of such payment shall be based on the extent of approved work carried out to the date of termination valued, by use of the costs used in the tender submission.

## **Appendices**

Appendix 1 – Trócaire Standard Terms and Conditions for Procurement

<https://www.trocaire.org/wp-content/uploads/2021/11/TROCAIRE-general-TCs-for-procurement.pdf>

Appendix 2 - Suppliers Code of Conduct

[https://www.trocaire.org/sites/default/files/trocaires\\_supplier\\_code\\_of\\_conduct\\_v2\\_07.2019.pdf](https://www.trocaire.org/sites/default/files/trocaires_supplier_code_of_conduct_v2_07.2019.pdf)