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**TERMS OF REFERENCE**

**“Reimagining Heritage Archives and Museums: Today/Tomorrow”**

**External Evaluation of the Project.**

1. **Rational**

The Embassy of France to South Africa, Lesotho and Malawi is inviting bids for the external evaluation of the project Reimagining Heritage, Archives and Museums: Today/Tomorrow (RHAM).

The project started in October 2022 and will be fully completed in April/May 2024. The evaluation foreseen in the project plan will cover all activities undertaken from February 2023 to April/May 2024, and will be managed by the consultant agency.

The evaluation will serve to assess the project design, its implementation, and achievements. The Evaluator will be expected to formulate recommendations to guide future collaborations in favour of strengthening heritage, archives and museums in South Africa and the broader Southern Africa and to develop professional exchanges in these three sectors covered by Reimagining Heritage, Archives and Museums: Today/Tomorrow (RHAM).

These Terms of Reference (ToR) spell out the requirements for the external evaluation.

1. **Brief presentation of the project**

Reimagining Heritage, Archives and Museums: Today/Tomorrow, is a multistakeholder project, initiated by the Institut Français d’Afrique du Sud/French Institute of South Africa (IFAS) and the Embassy of France, and co-constructed with South African partners and in wider consultation with African institutions. This international project includes a convening, a series of professional meetings to further the solutions and outcomes tabled at the convening, and a mentorship programme.

The project aimed to develop a framework for a new relational ethic between Southern Africa and France, and more broadly between the rest of Africa and Europe and set priorities for future cooperation projects between our regions. It explored ways to facilitate the preservation and promotion of heritage (material and immaterial), archives and museums through new ideas and concrete tools and programmes. Additionally, it aimed to address the complex challenges of today, driven by new technologies and vocal civil movements.

The mentorship programme took place alongside the convening and professional meetings to inspire and nurture a new generation of cultural professionals from South Africa, Lesotho and Malawi. This tailor-made skills-sharing and development programme included virtual learning and intensive in-person sessions to provide a platform for emerging voices to drive solutions

This convening was the first that IFAS and the Embassy of France are hosting in South Africa and signifies a renewed and ongoing commitment from the French Embassy and IFAS to support heritage, archive, and museums in Southern Africa.

The project was funded by the French Ministry of Europe and Foreign Affairs (MEAE) through a Special Support Fund and additional sponsorship from Absa Bank, MEMORIST and Groot Constantia.

**The main project objectives were:**

* Develop relations and synergies between heritage, archives and museum professionals (Africa-Europe), exchange expertise and best practices, encourage networking and give rise to cooperative projects.
* The project focus was then reframed to have a greater focus on Southern Africa and France.
* Prepare and organise an international conference in Cape Town.
* Prepare and facilitate a mentorship programme for young cultural practitioners from South Africa, Lesotho and Malawi.
* Organise professional meetings in Johannesburg/Pretoria.

**To date, the project has achieved the following:**

* Established the governance of the project: creation of a Steering Committee and Curatorial committee.
* Secured sponsors
* Onboarded partners
* Designed the convening, mentorship, and professional meetings programme
* Produced and implemented the convening, mentorship, and professional meetings programme

**Work in progress:**

* Producing post event online content for the IQOQO platform
* Communicating with stakeholders, partners, speakers, contributors and audiences
* Writing internal reports
* Closing off the budget

1. **Purpose of the evaluation**

This evaluation serves to mutually reinforce several objectives: accountability and learning and the purpose is threefold:

* 1. **Assess the RHAM project, looking at both the overall project and outcomes of the project:**
* Take stock of the activities implemented and results achieved, following the project plans.
* Assess the performance of the project and the resulting activities.
* Determine the relevance of the projects’ logic and interventions, their efficiency, effectiveness, impact and sustainability.
  1. **Draw lessons from project implementation:**
* Assess the need to further and/or expand this type of project.
* Identify the conditions and good practices to inform the development of a new project strategy to continue engagement in the three sectors (heritage, archives, and museums) in Southern Africa, between Southern Africa and France and possibly the wider African continent and Europe.
  1. **Assess the RHAM perspective:**
* Assess the RHAM goals after the end of the Special Fund in 2024 and in line with the continuity of the relationship established with the partners of the French Institute of South Africa.
* Establish recommendations to assess the RHAM potential to become a recurring project/event.

1. **Services requested**
   1. **Stocktaking:**

* The stocktaking exercise will include all aspects of the project, and consist of a brief descriptive account of the activities implemented, the financial execution and the governance of the RHAM project and a report on the actual implementation strategy (as it happened).
* The Evaluator will document and explain any departure from the planned activities and expected results. Doing so, he/she will be mindful to identify all context-specific events and circumstances that may have had an incidence on project implementation and achievements.
  1. **Evaluation criteria and questions:**
* The evaluation will apply the international OECD/DAC evaluation criteria of relevance, process/ implementation, effectiveness, efficiency, impact and sustainability.
* The evaluation should consider the gender-sensitivity and responsiveness of the project.

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| **Evaluation criteria** | **Evaluation questions** |
| **Relevance** | * To what extent the project resonates with IFAS past cooperation project stakeholders/ aligns with the needs of IFAS partners. * To what extent the project serves the expressed needs of the project partners in Southern Africa and across the African continent. * To what extent the convening is representative of Southern African professionals/ cultural practitioners from the three sectors (heritage, archives, and museums)? * To what extent the programme included practitioners from each of the three sectors. * To what extent the RHAM project was/is relevant for both Southern African professionals and French professionals and more broadly? * To what extent the RHAM content (convening, mentorship and professional meetings programme) impact/ed cultural practitioners? * To what extent the RHAM programme was able to reach the three sectors and supported Southern African development in these sectors? * To what extent RHAM has empowered or will empower Southern African cultural practitioners in the three sectors? |
| **Coherence** | * How the founding of the decision-making bodies was approached and did they include local experts from each of the respective sectors? * What was/is the governing and organisational structure and how were the roles and responsibilities defined? * Was the conduct fully in line with Sustainable Development Goals and transparency goals? * Was the project led by Southern African and French partners/stakeholders? * How RHAM will establish a clear pathway through which collaborators, partners, delegates, and wider beneficiaries can provide feedback and communicate with IFAS and the Steering Committee? * How is IFAS conducting a financial evaluation of the project costs and estimates of future projects ? * To what extent is the project model sustainable for the future or at least a second edition? |
| **Effectiveness** | * To what extent was the overall project implemented according to the initial plans/objectives?   + Successful attendance at the convening and proffesional meetings programme (200 people in Cape Town and 100 people in Johannesburg)   + Skills-training, network expansion and mobility for young South African professionals in the heritage, archive and museum sector.   + Professional satisfaction (satisfaction survey) / content quality.   + Quality of press review and coverage.   + Engagement on social networks and the IQOQO website. * To what extent RHAM succeeded to reaching their set out goals? * How well were the project resources spent by the IFAS and the French Embassy? * To what extent has the project succeeded in supporting the development of the three sectors in Southern Africa? * To what extent has the project contributed to strengthening French cooperation strategy with Southern Africa? * To what extent has the project contributed to connecting Southern African cultural practitioners and practitioners from the broader African continent in the three sectors? |
| **Impact** | * To what extent the project remained in line with SDGs, demographic data such as gender, youth (people under 40) and geographic location? * To what extent the project considered and represented all the provinces in South Africa and countries in Southern Africa and the broader African continent? * What impact the project had on women and youth? * How did the project encourage the support of local, regional, and international partnerships? * Did the project incorporate other regions beyond Southern Africa and France? * How did the mentorship programme impact the mentees? * How did the professional meetings strengthen the outcomes of the convening? * If and how will the project foster exchanges between local, French and other international partners. * How did the project encourage/ improve engagement between the three sectors? * How the three areas of the project (convening, mentorship, and professional meetings programme) became more transversal. |
| **Sustainability** | * What lasting effects can be identified (positive and negative) – from the whole project on the three sectors? * What lasting effects can be identified (positive and negative) – from the whole project on the three areas project (convening, mentorship, and professional meetings programme)? * Has the project contributed to structural / organisational improvements for the three sectors in Southern Africa and or other regions? |
| **Gender/demographic (age)** | * To what extent did the project succeed in including gender and intergenerational perspectives across the actors of the three areas of the project (convening, mentorship and professional meetings programme)? * To what extent did the project succeed in including gender and intergenerational perspectives across the beneficiaries of the three areas of the project (convening, mentorship and professional meetings)? * To what extent did the project promote gender equality in the three sectors and how? |

* 1. **Conclusions, lessons learned and recommendations**

Here the evaluator will present the main conclusions of the assessment conducted according to the evaluation questions, and draw the key lessons and strategic learnings from the evaluation, for instance (but not limited to):

* The added value of the project for Southern African practitioners in the three sectors.
* The added value of the project to contribute to bilateral cooperation priorities between France and Southern Africa respectively.
* Findings and lessons regarding the management of the project.

The evaluator will also formulate strategic and operational recommendations to be considered by the French Ministry of Europe and Foreign Affairs with regards to:

* The support to Southern African professionals in the three sectors through a similar funding mechanism.
* The target groups for future funding opportunities.
* Types of activities, including grantee interventions and communication activities, that would maximize the effect of similar funding opportunities.
* How to build on the work to date, and strengthen the French Embassy’s interventions for more systemic impact.
* Complementarity with the support programmes of AFD, the Delegations of the European Union and other EU Members States in South Africa.

1. **Methodology** 
   1. **Key principles**

**The principles underpinning the approach to the evaluation are:**

* Impartiality and independence of the evaluation process from the programming and implementation functions.
* Credibility of the evaluation, through the use of appropriately skilled and independent experts and the transparency of the evaluation process, including dissemination of results to the relevant stakeholders.
* Participation of the relevant stakeholders in the evaluation process, to ensure different perspectives and views are taken into account.
* Usefulness of the evaluation findings and recommendations, through timely presentation of relevant, clear and concise information to decision-makers.
  1. **Methodology**

The evaluation will be carried out using a desk review, interviews (phone / in-person) as relevant and as permitted by the budget. The proposed methodology for the evaluation will be subject to the approval of the French Embassy.

**The desk review should cover the following documents:**

* project plan and budget (including amendments if applicable);
* documents and materials produced throughout the project;
* evidence of activities and results collected by the project, including interim reports, minutes of project meetings, mission reports, any other supporting document (including financial), etc.
* any other relevant documentation.

The Evaluator(s) are expected to engage with the relevant IFAS/Embassy staff members, production, communication and cosultancy agencies, steering and curatorial committee, partners, mentees, speakers/contributors and any other relevant project stakeholders from the side events and professional meeting and intended beneficiaries as and when possible.

**The evaluation should build on interviews with them not only to collect information and insights, but also to make (collective) sense of and understand the following:**

* The stakeholders’ engagement in the process, how it has been promoted and how it fits with their own work/aims;
* The difficulties they have faced, in any, to engage in the project (internal and external);
* Their perspectives on the issues;
* The capacity, awareness, relationships, and resources developed during their engagement with the project and what they have been able to do with that.

Bidders are requested to explain how they propose to collect information from the various stakeholders.

* 1. **Data availability**

**The Evaluator(s) will have access to the following information:**

* Project description, budget, as amended if applicable.
* Contractual agreements between the French Embassy and the project partners.
* Financial reports reflecting project spend.
* Project reports compiled by the IFAS Cultural Attaché, Project Coordinator and production agency.
* Mission reports when available.
* Communication materials.

1. **Management**

This evaluation is commissioned by the Cooperation and Cultural Action Department (SCAC) of the Embassy of France and the French Institute of South Africa (IFAS). The SCAC/IFAS will be the focal point for any planning, implementation and administrative matters pertaining to the evaluation.

The evaluator will report his progress and final evaluation to IFAS and the steering committee.

1. **Process and deliverables**

The evaluation will follow a 3-stage process, with deliverables as detailed below (see also the tentative timeline in section 8 below).

All deliverables will be submitted by email to French Institute of South Africa (IFAS) who will share them with the RHAM Steering and Curatorial Committee as needed.

The Evaluator(s) shall consider the comments received without prejudice to their independence.

All deliverables will be approved by the SCAC/IFAS by email.

* 1. **Inception**

**This stage will serve to:**

1. **Clarify the expectations of the French Embassy and the scope of the evaluation.**
2. **Finalise the methodology and the evaluation questions.**

**Inception meeting between the Evaluator(s) and the IFAS RHAM team:**

* This meeting will serve to introduce the evaluation work more in details and share the documents and contact details needed for the evaluation.

**Inception report**:

* In this report, the Evaluator(s) will recall the context and purpose of the evaluation; list out the evaluation questions, and detail the methodology and tools / means to collect the data; specify the schedule for data collection, including field visits if any; and provide a list of stakeholders to be interviewed (in-person or through calls / online communications).
* The Evaluator(s) will submit a draft inception report to IFAS Cultural Attaché and the Project Coordinator, who will share with the IFAS project team for review. The Evaluator(s) may be requested to submit a revised version taking into account the comments received, for approval.
  1. **Data collection and analysis**
* During this stage, the Evaluator(s) will collect the data needed for stocktaking and analysis according to the evaluation questions. This will be done through a desk review of project documents, interviews and field visits when appropriate.

**Meetings**:

* Field visits to activities and partners through the project may be carried out for data collection purposes. They will be carefully planned, taking into account the evaluation timeline and availability of the people and organisations visited.
* The IFAS Cultural Attaché and project coordinator will assist with the organisation of the meetings. The Evaluator(s) will provide the IFAS Cultural Attaché and Project Coordinator with terms of reference for each visit, and submit concise field visit reports including factual information, data obtained and challenges met.

**Draft evaluation report (max. 30 pages, excluding annexures):**

* The draft report will include: stocktaking (see section 4.1 of the ToR), initial analysis according to the evaluation questions (see section 4.2), and an outline of the work remaining and timeline.
  1. **Final reporting**
* This stage will allow the Evaluator(s) to finalise their analysis, draw the conclusions and formulate recommendations.

**Final evaluation report (max. 50 pages, excluding annexures) will be structured as follows:**

* Table of content
* List of acronyms
* Executive summary (2 to 4 pages)
* Stock take
* Analysis according to the evaluation questions
* Conclusions
* Strategic and operational recommendations
* Annexures: list of stakeholders interviewed, and field visits conducted; data collection instruments; list of documents used for the evaluation (including websites if applicable); field visit reports.

**A summary of the validated final report (max 5 pages), using the template provided by the Embassy:**

* Summary of the evaluation and analysis
* Main findings
* Strategic and operational recommendations

The report and the summary will be the sole property of the French Ministry of Europe and Foreign Affairs (MEAE). The Evaluator(s) shall not communicate, publish, or use its content. The report may be shared, in full or in part, with the relevant South African authorities and with the beneficiaries.

**Close-out meeting dedicated to the presentation of the evaluation to the IFAS/ RHAM project team, Steering and Curatorial Committee:**

* This meeting will allow the Evaluator(s) to present the findings of the evaluation to the IFAS and Steering Committee, and provide an opportunity to discuss the conclusions and recommendations.

1. **Tentative timeline**

The evaluation will be carried out between March and May 2024. Bidders are requested to indicate the proposed number of working days within this time period.

**The tentative timeline is as follows:**

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| Deadline for submission of tenders | 18 March 2024 |
| Selection and award of contract | 25 March 2024 |
| Inception meeting | 26 March 2024 |
| Submission of draft report | 15 April 2024 |
| Review of draft report by Steering Committee | 22 April 2024 |
| Submission of final report | 19 April 2024 |
| Close out meeting with Steering Committee | 3 May 2024 |

The timeline will be reviewed and confirmed with the Evaluator(s) at inception phase, without changes to the completion deadline.

1. **Budget**

The maximum available budget for this work is EUR 15 000, all costs and taxes included.

The amount will be paid in ZAR, at the exchange rate calculated by the French Economy Ministry at the time of payment.

For instance on the 01/03/2024: ZAR 1 = EUR 0,0481100000

<https://www.economie.gouv.fr/dgfip/taux_chancellerie_change_resultat/pays/ZA>

1. **Additional information for bidders**

Further information about the project may be obtained from the IFAS. Requests should be addressed by email to [projectmanager.museums@frenchinstitute.org.za](mailto:projectmanager.museums@frenchinstitute.org.za) **by 15 March 2024**.

**The Evaluator(s) should have knowledge and experience in the following areas:**

* Expertise and experience in designing and delivering project evaluation; experience M&E of projects in the three sectors (heritage, archives, museums) would be an asset.
* Using reviews and evaluation as a tool for lesson learning.
* Demonstrated understanding of South Africa/ Southern African dynamics.
* Good communication skills, both orally and in writing.
* Excellent English writing and oral skills. Understanding of French is not required but an advantage for access to project document.

1. **Bidding process and how to apply**

**Interested candidates must submit the following documents/ information to demonstrate their qualifications:**

* Technical proposal (max. 20 pages):
  + Explain their understanding of the work and deliverables.
  + Provide a brief methodology on how they will approach and conduct the work, including a tentative schedule.
  + Explain why they are the most suitable to perform the evaluation work.
* Financial proposal, based on the template in Annexure.
* CV of all consultant(s) highlighting past experiences in similar projects/assignments.
* At least 2 references.

Interested candidates are requested to submit an electronic copy of their expression of interest/ proposal with the subject REF: “RHAM Evaluation – *[name of Bidder]”*.

Applications must be submitted to [projectmanager.museums@frenchinstitute.org.za](mailto:projectmanager.museums@frenchinstitute.org.za) **by 15 March 2024.**

1. **Contract award criteria**

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| **Description** | | **Weight** |
| Technical criteria | | |
| a | Competence and experience of the team with regards to the three sectors. | 20 |
| b | Competence and experience of the team with regards to project evaluation (data collection, analysis, recommendations) | 20 |
| c | Adherence to ToR’s specifications and related requirements, clear understanding of needs and deliverables. | 20 |
| d | Robustness and relevance of the methodology | 10 |
| e | Ability to deliver Assignment within the given timeline | 10 |
| f | Communication, Writing skills and language proficiency | 10 |
| Commercial criteria | | |
| g | Competitive fee rates and expenses in relation to the market and demonstration of value for money. | 10 |
| Total | | 100 |