

Terms of Reference: Monitoring Evaluation and Learning Partnership for Porticus-funded 'MOVE' Programme

1. Programme Title

MOVE- Transforming migration parameters through movement building and lived-experience leadership.

2. Introduction

[Porticus](#) is an international organisation that manages and develops the philanthropic programmes of charitable entities established by Brenninkmeijer family entrepreneurs. Porticus collaborates with partners around the globe to foster human dignity, social justice and sustainability. Porticus values – empathy, modesty, endurance and trust – inspire the work of its teams and are the bedrock of all its relationships with its partners. Porticus has 12 offices worldwide with four main global and local priorities: a) Building Future Generations; b) Strengthening Our Societies; c) Fostering Vital Faith Communities; d) Caring for the Earth.

Within the [Strengthening Our Societies Sector](#), Porticus is about to engage in a new, five-year, global programme focused on movement building and leadership in the field of migration ([MOVE](#)), for which we are seeking a MEL partner. This document sets out the developments to date, the objectives of the new programme, the role of the MEL partner, the selection criteria and how to respond to this ToR.

3. Key Programme Information

- **Focus:** Movement Building and Lived Experience Leadership
- **Regions:** Based on our geographic footprint and occurring opportunities for engagement (e.g. presence of migrant led initiatives and networks, involvement of funders), this programme brings together **five Porticus regions** (Africa, Asia, Europe, Latin America, Middle East and Northern Africa). This will facilitate an inclusive and cross-regional approach with each region deciding its own contextual and country specific implications but altogether identifying promising features for synergies and exchange.
- **Pilot phase:** The programme began with a Pilot phase in 2022, with core grants to ten Pilot partners. A Learning Partner worked with the pilot partners to consolidate insights and analysis that directly informed the initial programme design.
- **Duration:** The programme, launched in August 2022, is currently planned for five years from November 2022 (with the intention to extend the programme to ten years). The budget is currently planned through 2024 only, so we are establishing this MEL partnership for 3 years.
- **Programme Management:** The programme is co-managed by programme managers in Europe and Africa, and high-level direction from the Portfolio Manager.

- **Grantmaking:** It is planned that 20-30 grants will be made by programme staff within each region, mostly to locally based organisations with some grants to intermediaries, and/or at the regional/global levels. A staggered approach will be used when making grants, i.e., partners will be identified and start implementing projects at different time during the programme. We will seek to support programme partners to collaborate with and learn from each other, particularly through the MEL framework. We intend to apply an inclusive approach to grantmaking and are interested to test and apply participatory approaches in the future.
- **Programme Design:** Porticus will take a collaborative, learning based approach to programme development. As grant-making is staggered, we will design a mechanism to onboard new partners and create space to reflect and evolve the programme. Building on the pilot phase and work of with the learning partner¹, there will be regular and on-demand engagement (e.g. in-person meetings, webinars, workshops, etc.) to reflect and analyse different contexts and approaches, (re)iterate the theory of change, review and discuss the roles and collaboration opportunities, take corrective actions, and develop new interventions as needed. We anticipate the MEL partner to facilitate or co-facilitate these activities with Porticus and/or partners.
- **Learning and MEL:** As a new strategic approach for Porticus, learning is a central focus of this programme across all regions. In the Pilot phase this learning was supported by the Learning Partner and will continue and deepen with the launch of the MEL partnership. The MEL Partner will be a critical part of the programme team. Together, we aim to create a participatory learning environment with all partners, in alignment with programme values and objectives. We hope that learning and practice from this programme can be shared with peer funders to contribute to a wider shift.

4. Programme Summary

Context Analysis: Across the world, millions of people move across borders driven and pushed by economic, political, familial or social factors. Yet migration is problematised and people who migrate are frequently oppressed by violent systems of attitudes, laws, policies and practices. They are denied agency, dignity and rights as a result of their migration experience. This disproportionately impacts ethnic minorities, women and girls, LGBTQ+ people, people with disabilities, who are often identified amongst the most vulnerable people on the move.

Despite the scale of migration and the common experiences of oppression, discrimination and violence, there is not yet a powerful movement to challenge the underlying reasons for these experiences. Powerholders (governments, policymakers, institutions) are neither accountable to, nor informed by the views of communities marginalized due to their migration status.

¹It is expected that the MEL partner will work closely with the learning partner at the beginning of the MEL design process to understand current learnings and reflection, remaining questions and learning priorities. The learning partnership was set up for the pilot phase and programme design and will come to a close at the end of 2022, allowing for this period of overlap and exchange so that one process builds on the other.

There is not deep or broad social pressure to transform the root causes of oppression (such as authoritarian values, racism or economic inequality) or retain hard won protections or rights. In the absence of this broader social pressure, most current approaches to positive change on migration tackle symptoms instead of underlying causes. Strategies deployed to change laws for example are developed in a top-down mechanism. There are no or limited accountability mechanisms and assumed ‘wins’ and positive changes can quickly be reversed or undermined, and existing protections rolled back.

Initiatives and CSOs led by those experiencing overlapping and deep-seated problems are trying to work in a different way to build power, represent themselves on issues that affect them, and shift the systems that affect their lives. However, there are several **systemic bottlenecks** preventing those groups from successful and sustainable engagement and movement building.

1. **Lack of access and space for lived experience representation and participation:** existing channels are usually limited to *ad hoc* consultation, there are few institutionalized ways to co-design and decide on directions of reforms and policies. Leaders with lived experience have limited spaces and opportunities to meet, exchange and strategize.
2. **Lack of resources and development opportunities:** there is not enough investment in or support for organisations and leaders to develop approaches that build towards social movements (e.g., learning, training, networking, experimenting), they often lack the ‘back office’ functions necessary for their work to grow and be sustained. Many initiatives are not able to exert any influence or access resources due to concerns over their individual or organisational legal status.
3. **Existing power imbalances and tokenism:** LEX leaders and changemakers are frustrated with being portrayed as passive victims and ignored or marginalized in conversations about their lives, and often experience tokenism. They struggle to access resources that allow them to develop, continue and deepen their work building real solidarity, creating alliances, shifting power dynamics and culture as well as fostering relationships. They lack support and often end up burnt out, many facing risks to their safety and health.
4. **Funder culture and practice:** funder practice has not adapted to support and catalyse this way of working. Many funders’ priorities working with organisations with a track record and do not take risks in collaborating with less established actors. Contested practices include short term funding, output focused projects and institutional funding culture. The level of funding, when available also is generally much lower.
5. **Scattered approaches and insufficient evidence:** Desk research show a wide range of evidence on feminist, civil rights or racial justice movements. However, social movement studies have produced a limited amount of research on the issue around migrants’ struggles. We have identified scarce and fragmented information and documented knowledge building to an evidence base around movements in a migration context. This lack of evidence has been confirmed by our partners.

Our Planned Approach: Based on the above context analysis, this programme will centre support to movements and lived experience leadership to realize systemic change. This approach is based in the understanding that structural, sustainable change is possible only when people most affected by injustice can transform their own lives and communities. Strong, sustained social movements by and for people with lived experience are critical to shifting individual mindsets, social norms and practices, as well as policies and legal frameworks. Resources, financial and otherwise, are critical to this work.

It is important to note that there is not one migrant movement to speak off but globally spread emerging initiatives at various levels (global, regional, local). These conditions also reflect the fragmented nature of migration control regimes and in order to be effective, migrant movements have to operate at the different levels of control, law and policy making. We intend to be responsive to opportunities for impact emerging in our respective regions and countries, with some engagement on global initiatives (always linked to regional actors) and less engagement directly at local level. The primary focus will lie on destination and transit countries of migrants aligned with our existing work, arising promising opportunities in countries of origin can be potentially considered as well.

The decisions on what specific groups we focus (e.g. refugee leaders, migrant worker leaders, refugee women or trafficking survivors as a target group addressed in several Porticus programmes before) will be determined in the next phase of the programme development, informed by context analysis with partners and other stakeholders.

The long-term **Social Change Goal** this programme seeks to contribute to is:

- *People who migrate live in human dignity, have their human rights fulfilled and experience just and equitable migration environments protecting their wellbeing and personal development.*

Porticus is a philanthropic organization that works towards ‘systems change’, we are interested in understanding and addressing the root causes of systemic challenges in order to realize long term transformation. Therefore, we have a **Systems Change Objective**:

- *LEX leaders shape migration agendas (policies and practices and resource flows) and change power imbalances in migration systems influencing the conditions and needs of people on the move.*

We seek to contribute to this systems level change through work towards the following **Outcome Areas**² over the next five years:

- **Representation and participation:** Migration related NGOs / CSOs and migrant-led initiatives who work to change migration systems (work within) sharpen their leadership qualities and directly influence decision making through better access and voice.
- **Mechanisms for movements:** Those migrants who identify as being part of a movement can deploy the mechanisms (e.g., access resources, develop organisational

² These Outcomes are preliminary, and subject to refinement and adjustment through the ToC process.

strengths, build skills, receive legal status) they need to reform the migration status quo.

- **Allyship and solidarity:** Key actors in the ‘movement ecology’ prioritise and resource lived experience leadership and movement building (funders, INGOs, civil society), they open spaces and build strong allyship.
- **Porticus change:** In order to engage in movements and contribute to deeper change in powerful systems, we need to reflect on ourselves, our funder practice and the culture and behaviour of our partners. Our internal practices will reflect a commitment to, and relationship with, lived experience leaders and change-makers.
- **Creation of evidence and field building:** A mixed group of researchers and practitioners co- creates an evidence base in order build a better understanding of movements in migration settings, learn from successful examples, strengthen the movement building field and catalyse further funding, allyship and solidarity.

The development of the programme will take place in recognition of the fact that movements attempt to create change across power structures and are rarely defined around shifting only one part of a system. When tackling systems of oppression, social movements are often working to change intersecting and compounding power structures such as patriarchy, colonialism, racism, ableism and other forms of oppression based on one’s identity. Movements recognise the complex interplay of forces at play in our lives and are focused on changing the mindset and attitudes both within and among us and in structures and institutions. This is often referred to as ‘intersectionality’. Inclusive movements aim to redress the power imbalances that negatively impacting non-dominant groups.

In this programme, we will acknowledge the intersectionality of different systems and develop an inclusive and gender sensitive programme to tackle existing power inequities between persons of different genders and other non-dominant groups. We will incorporate internal and external expertise from the beginning to strengthen our learning and build sustainable structures addressing the complexity of the topic.

5. Purpose of MEL Partnership

As a new strategic approach to programmes for Porticus, the MEL partnership is central to the MOVE programme. We are looking for a MEL partner that will work in deep collaboration with grantee partners and Porticus staff, brings an innovative and rigorous approach to the design of the MEL framework, and is able and willing to commit to the entire duration of the programme. The MEL partner should be attentive to power dynamics, intersectionality and inclusivity and be flexible in meeting different learning priorities while ensuring knowledge is collected and synthesized according to Porticus requirements.

The process to develop and execute the MEL Framework must align with and serve the values and objectives of the programme. We see the MEL partner as a critical stakeholder, and a key actor in the programme team. The MEL Partner will help design and lead a participatory process to create a MEL Framework that supports learning and analysis for multiple audiences. The Framework must capture grantees’ approach to change and serve their learning priorities, as well as document and analyse their collective contributions and impact. It is expected the MEL Partner will use the MEL Framework to support the Porticus team and partners with evidence based, structured analysis, reflection and refinement of the

programme based on key lessons. Given that movement building and lived experience leadership are long-term, complex approaches, the MEL Framework should support measurement and learning of changes at multiple levels. In addition, the MEL Partner will use the MEL Framework to support the creation of various knowledge products that support a programme narrative for internal (Porticus programme staff and trustees) and external (partners and peer funders) understanding and advocacy.

We expect the MEL partner to practice and help us to refine and realize some emerging principles:

- **Co-creation, participation and learning:** Co-create the MEL methodology with grantees and partners so MEL activities are useful to them, appreciative of their work, and reflect their approach to change. (Note that Porticus is a signatory to the [Refugee Participation Pledge](#)).
- **Responsiveness and flexibility:** Recognise and respect multiple ways and forms of knowledge, value diverse views and experiences, and respond to the needs and views of partners.
- **Understand change is not linear and is multi-factorial and context-based:** shifts in the geo-political context, including conflict, can reverse hard won changes, and shift organizational priorities and strategies. In addition, the transformation of migrant and refugee realities can take place at the individual to systemic levels. The grantees in this programme are diverse in their approach and focus, so it will be important to develop ways of understanding ‘victories’ in relation to their contexts as well to building a shared framework for understanding their work and building a collective narrative.
- **Movements and leadership:** movement building and LEX leadership are both a means and an end of this programme. It is important to develop a MEL framework in partnership with grantees, that understands their work in relation to broader systems change with and for movement building and lived experience leadership.
- **Porticus learning:** How can MEL findings be used to support Porticus learning and reflection as a new funder in this space, as well as support peer to peer advocacy with other funders.

We seek to address the following evaluation questions, recognising these will be informed and adjusted based on grantees’ needs and contributions:

- To what extent has the programme and its grants, individually and collectively, contributed to strengthening movements and lived experience leadership to transform migration parameters?
- To what extent has the programme and its grants, individually and collectively, contributed to the resilience and strength of movements and lived experience leaders, and shifted the attitudes and behaviour of allies in the ‘movement ecology’?
- To what extent has the programme contributed to stronger cross-continental collaborations between stakeholders dedicated to transforming migration parameters?
- To what extent has the programme and its grants increased the performance and adaptability of the stakeholders involved in the programme?

- To what extent has the movement focused approach translated to improvement of the normative (at national and other levels) and convening (at the UN and other levels) environments relevant to People on the Move?
- To what extent has Porticus' internal practice shifted and changed to reflect a deeper relationship with change-makers and lived experience leaders?
- The MEL partner will support Porticus to ensure complementary learning between all three programmes under People on the Move (the other two programmes are Enhancing Labour Pathways and Ending Immigration Detention, both with their own MEL approach).

6. Timeframe

The MEL partnership will begin as soon as we have completed the selection process (planned October 2022). While this is a five-year programme, the budget is planned through 2024, hence the MEL partnership will be renewed after three years. This will allow an opportunity for reflection with the team about the partnership and support any changes as needed.

7. Potential information sources

These include, but are not limited to:

- Porticus: programme managers across the five regions, Grant Managers & Grant Administrators
- Learning from the pilot phase (the current learning partner is due to complete their work in December 2022)
- Project Grantees: project team & MEL staff
- Other Stakeholders: other funders, UN agencies, international organisations, CSOs, activists/ public figures, thought leaders on movement building and shifting power
- Relevant programme documentation to be generated throughout the programme, e.g. programme plan, research reports, policy briefs, press release, etc.

8. Suggested Methodology

The evaluation approach should ensure findings are easy to use, focused and relevant to the development of the programme. Overall, we would anticipate the MEL partner to use a combination of qualitative and participatory data (e.g. most significant change, outcome harvesting, and case study development) and quantitative methodology with a complex adaptive systems lens. Methods should take into consideration the distinct nature of the interventions under each of the main outcomes of the programme, possibly proposing different methodologies to evaluate each (where qualitative methods may be more appropriate for one and quantitative methods may be more possible for the other).

It will be important for the MEL partner to propose and to consider, with partners, who data is collected from and how. It could be helpful to gather data from (a) partners, (b) participants, people with lived experiences who are supported by projects, and (c) influencers and allies such as policy makers and/or community/opinion leaders who work towards transforming migration parameters. The MEL partner should bear in mind that individual grants will not all start at the same time and should consider this key element in the proposed methodology. Methodology should include strategies to include a range of views and participants, including a range of languages.

9. Deliverables and Standards

We are keen for applicants to propose deliverables that meet the purpose of the MEL partnership as set out in section 5. We suggest that at least some of the following deliverables would be useful, and invite applicants to propose additions or changes:

- A **Living Workplan**.
- Facilitation of **participatory workshop(s)** to develop the MEL framework and periodic meetings to reflect on and consolidate learnings to refine the programme (and adapt MEL framework).
- A comprehensive **MEL Framework/ Methodology and Theory of Change** based on this participatory design process that is accessible to partners and Porticus staff.
- **Periodic learning documents** (e.g. learning memos) that build on the learning phase and consultant work to address questions, including those proposed above.
- **Grantee learning support** as needed, potentially including: webinars/ workshops and tools to support collective learning needs, review of, or support in developing individual ToC, MEL frameworks and learning plans.
- **Interim learning reports**: These will be for internal use of Porticus and should document key learning about process as well as emerging findings or results based on output/outcome data so far.
- A **final summative outcome/impact and process report**, capturing what we have learned about what worked as well as what could be done better, aimed an internal audience to ensure openness and transparency. Part of the report could be published for external audience. This would be delivered after programme completion.
- A **learning summit** for grantees, Porticus staff (including other Programmes and potentially other funders) at the end of the programme.
- Collection and refinement of data and narrative content to develop **infographics and short videos** (potentially in partnership with a communications partner) to communicate all the above in brief, visual and plain language.

10. Stakeholder Involvement

STAKEHOLDER	TYPE AND LEVEL OF ENGAGEMENT WITH EVALUATION
PORTICUS PROGRAMME TEAM	<ul style="list-style-type: none"> · Commission and fund MEL partnership · Oversee MEL partnership, including facilitating relationship building and management across MEL Partner and grantees · Work with MEL partner to ensure the creation and execution of a participatory MEL process, and agreed deliverables · Be first point of contact for any management/ delivery issues or issues of concern · Shape decision-making of programme based on MEL inputs · Disseminate findings and lessons in appropriate forums · Review and assess proposals received and manage partners <ul style="list-style-type: none"> · Take an active role in learning sessions, participating and/or co-facilitating ·
GRANTEE PARTNERS	<ul style="list-style-type: none"> · Participate in MEL partner selection, if interested · Participate in the development of ToC, review, test and validate · Inform the design of the MEL framework and execute strategy to collect and report on monitoring data · Engage in and drive learning to improve the programme and future work · Provide timely, accurate and reliable data and information · Take an active role in learning sessions, participating and/or co-designing and facilitating · Input and comment on MEL methodology proposed, throughout programme development · Participate learning and reflection sessions · Re-grant and make introductions, as necessary, to re-grantees (some of partners)
MEL PARTNER	<ul style="list-style-type: none"> · Create a trusting and comfortable atmosphere for all parties to learn, together · Employ participatory methodologies to develop and execute appropriate MEL Framework, based on programme objectives, grantee needs and capacities · Build on grantees existing MEL systems and practices · Engage with the learning partner, programme managers as a team · Support monitoring, undertake evaluation and produce agreed deliverables

11. MEL Team Requirements

We are committed to seeking diversity of all kinds, including promoting and valuing lived experience. As such, it is a requirement that the MEL Partner leadership team represent the

diverse regions where this programme is working, including the Global South. We are particularly interested in teams with members from the movement field and with lived experience of migration.

The MEL partner must have:

- Experience in creating and executing high quality MEL systems to learn and assess change efforts in complex systems, including work to shift power at multiple levels
- Experience in developing participatory MEL processes and frameworks with a strong commitment to power-aware processes and equity
- Have clear knowledge of MEL approaches relevant to complex environments and how these are implemented in practice
- Strong understanding of the issues facing people who migrate and the systems that intersect
- Ability to work in cross-cultural environments, build strong interpersonal relationships, and facilitate effective collective learning spaces
- Ability to structure and analyse multiple forms of learning
- Be enthusiastic about learning from what does not work as well as what does (demonstration of ability to learn from past failure in subsequent work would be an asset)
- Experience in designing and implementing technical assistance activities
- Be sensitive to and respectful of social and cultural differences, and comfortable with working and communicating across those differences, including able to communicate complex ideas in accessible ways and gather data from and with partners and beneficiaries across regions

12. Budget

We would like the MEL partners tendering for this work to propose a budget and a time breakdown that fits the methodology they propose. We would expect the total budget, covering the duration of the whole MEL partnership and including the deliverables requested and proposed, to come under EUR150,000. *However, please note this ceiling is for guidance only; we would expect the budget to vary according to the methodology and deliverables proposed.* We will assess proposals according to how well the proposed methodology meets the requirements set out in this Terms of Reference and the expertise and experience of the MEL partner.

13. Application Process

All applicants are invited to submit an expression of interest (EOI) (to a.hagen-dillon@porticus.com by 9am CEST, September 13th with the subject line “Application for MEL Partnership for MOVE Programme”).

The EOI should be no longer than 3 pages and include the following information:

- Headline summary of proposed approach
- Composition and relevance of the MEL team

- Experience in conducting similar work (including 2 references to be contacted at the next stage of the selection process)
- Suggested headline budget range

The EOIs will be reviewed by the Porticus team as well as partners from the pilot phase of the programme. Selected applicants will then be invited to submit a full proposal and participate in a panel interview, which will include a number of grantee partners from the pilot phase. **Invitations to submit a full application will be sent by September 21st, with a deadline of October 3rd.**

Organisations will be able to claim for preparation time for the full bid – this will be discussed with the short-listed applicants.

14. Clarification questions

An open zoom call for interested applicants will be held on September 6th at 11am CEST. Please [register here](#).

All those registered will be sent a copy of the recording. If you cannot attend and wish to raise a question, please email it in advance to Augusta Hagen-Dillon a.hagen-dillon@porticus.com by 5th September.

15. Ethical Considerations

Considering the nature of the programme, it is of utmost importance that the MEL partner comply with internationally accepted norms and standards for evaluation, as well as ethical considerations. All those engaged in designing, conducting and managing learning and evaluation activities will aspire to conduct high quality and ethical work guided by professional standards and ethical and moral principles. The MEL partner must clearly identify any potential ethical issues and bottlenecks that may impede or undermine the minimum ethical requirements. The process for ethical review and oversight of the whole process shall also be elaborated and addressed in the full proposal stage.