

**Request for Expression of Interest**  
**Consultant for Evaluation for Wellspring Philanthropic Fund**  
**Human Rights and Accountability of Economic Actors**

The International Human Rights Program at Wellspring Philanthropic Fund seeks consultant(s) to assess how the work funded by the Human Rights in the Global Economy theme over the last 10 years has advanced toward its objectives of securing accountability of corporations and financial institutions to human rights.

**1. Program Description and Background**

Wellspring Philanthropic Fund is a global philanthropic institution committed to the effective advancement of social justice and human rights. We strive to cultivate accountable social systems and structures that uphold human dignity, strengthen agency, and advance equity for all people.

The International Human Rights Program (the “Program”) supports grantees working to prevent human rights violations and protect civilians during conflicts and crises; to end impunity for rights violations involving governments, corporations, and other economic actors; to advance disability rights; and to ensure that human rights organizations and activists can do their work safely and effectively. The Program has supported work to hold economic actors, including corporations and public financial institutions, accountable to human rights for over a decade, in a theme of work titled Human Rights in the Global Economy (“Global Economy theme”). The primary focus has been on the difficulty of holding transnational economic actors to account for their human rights impacts given the lack of an enforceable global human rights framework that applies to them, and on closing this accountability gap.

The primary strategies supported have been (i) policy and legislative advocacy (both national and international), and (ii) strategic litigation, primarily at the national level both in countries where abuses occur, and in countries where multinationals are headquartered; and casework and advocacy using identifying and pressuring buyers, investors, other financial institutions, and others with economic leverage over companies responsible for abuse. In addition, the theme has supported field-building strategies including network development and coalition-building; peer exchange, learning and support structures; innovation and development of new tools and strategies; and a robust information ecosystem for the field.

**2. Evaluation Objective and Purpose**

The Program seeks to assess how the work funded by the Global Economy theme over the last 10 years has advanced toward its objectives of securing accountability of economic actors to human rights norms, and the impacts of its grantees’ work, both on the ground in specific cases and with specific policy advances, and in changing systems more broadly.

The purpose of this evaluation is to assess and develop evidence for the value of the theme’s funding, approach, and grantees. We intend to use the findings:

- (a) to illustrate the value and impact of the theme’s funding to date for our leadership, board, and donors; and
- (b) as evidence to guide choices by the theme going forward

The evaluation will need to develop relevant indicators to assess the impacts of the theme to date. In addition, beyond this retrospective evaluation, we expect to use these metrics as part of an evidentiary framework that the program will use *prospectively* in strategic decision-making and to compare potential future funding strategies.

A final purpose is to generate learning and knowledge that both funders in the field and the broader ecosystem of actors can use to operate more effectively, although the final findings will not be published or widely disseminated.

### 3. Evaluation Questions

Below are draft evaluation questions that Wellspring would like to discuss and refine with the consultant/team once the consultancy is procured:

The primary questions we seek to answer through this consultancy are:

1. How has the work funded by the Global Economy theme over the last 10 years advanced toward its objectives of securing accountability of economic actors to human rights norms? More specifically, what have its grantees collectively achieved using the following strategic levers?
  - **Policy and legislative advocacy** (national and international)
  - **Strategic litigation**, primarily at the national level both in countries where abuses occur, and in countries where multinationals are headquartered
  - **Casework and advocacy using pressure on buyers, investors and other financial institutions** with leverage over companies responsible for human rights abuses
2. In addition, how has the Global Economy theme's funding of **field-building strategies** contributed to gains in law and policy, strategic litigation wins, or other systemic changes? The field-building strategies funded include network development and coalition-building; peer exchange, learning and support structures; innovation and development of new tools and strategies; and a robust information ecosystem for the field.
3. What are the costs associated with each of the achievements reviewed and evaluated, in terms of: (i) amount of funding and expenditures the field directed toward the work that produced the achievement, and (ii) any ancillary costs or harms?
4. What **indicators can or should the Program use in future** to assess the impact of the theme's funding? This could include indicators that cannot be reconstructed retrospectively for this evaluation but that the evaluation team recommends to measure going forward.

When answering the above questions, the evaluation approach should take into consideration the following:

- a. For impacts and successes in specific cases, the program requires evaluation of **the systemic impacts of the case**, such as its influence in policy advocacy, how it shaped public opinion, or its deterrent effect toward other similar companies—not just the gains (and any costs or harms) for people directly implicated in the case, e.g., plaintiffs or a class in strategic litigation. Similarly, **if a policy was secured or law was passed** in one country or concerning one business

sector, what were its **direct impacts**, and what **impacts did it have in other countries, or on other sectors**?

- b. The program is particularly seeking **quantitative evidence and data** to measure the theme's impacts. How many people were affected, both directly and indirectly, by the shifts and advances that the work funded by the program secured? How were they affected? What indicators can be used to measure those gains?

#### **4. Methodological Considerations**

The set of indicators developed during the course of this evaluation should include quantitative and qualitative measures that capture systemic changes that go beyond the passage of policies and regulations to their impact.

The Program expects that the evaluation team will conduct a systematic review of both the Program's own documents and grantees' documents. While the Program expects that the evaluators will conduct interviews with grantees, subject matter experts, and other stakeholders, the evaluation report should go beyond a synthesis of interviews or a general assessment of changes in the field, and reach concrete conclusions about the impact of the Global Economy theme's funding, using the indicators developed.

The findings and conclusions of the evaluation should be informed by data that has been triangulated and cross-verified from multiple sources.

The broader evaluation methodology is up to the discretion of the applicants.

#### **5. Deliverables**

The following is a tentative list of deliverables for this evaluation:

- 1) A long-form evaluation report for the program, presenting the methodology including quantitative and qualitative indicators developed; the data gathered corresponding to these indicators; and an in-depth analysis of the data and an assessment of the overall progress made. This report should include a full bibliography and list of people and organizations interviewed.

The evaluation report should also include any indicators or framework that the evaluation team would recommend using in future – whether or not it was feasible to apply that framework and assess progress on those indicators in this case.

- 2) A full draft of the long-form report, with preliminary findings, by the first week of October 2025, for Program staff's review, discussion, and feedback.
- 3) A distilled, short-form version of the report (no more than 10 pages) for internal communication. This should include infographics, quantitative elements, and data visualizations illustrating and summarizing the main conclusions.
- 4) A version of the report (long-form, short-form, or slide presentation summarizing findings) that is "scrubbed" of any information specific to Wellspring, including the names of specific grantees, to share with other donors and participants in/contributors to the report.

Once a consultant is selected, we will work with them to schedule regular check-ins and agree upon a reasonable set of midterm deliverables (e.g., a draft of initial indicators, list of potential data sources etc.) in addition to the final deliverables outlined here.

## 6. Budget and Timeline

Program staff expect this project to be completed within 12 months of entering into a contract, including an initial inception phase spanning 6-8 weeks which will be focused on finalizing the methodology.

The estimated budget range for this consultancy is USD 100,000-150,000. If your proposed budget is beyond this range, please include the rationale for the proposed budget. We are open to working with consultants to right-size the scope and budget for an evaluation approach that is best suited to fulfilling the evaluation objective.

Following is the anticipated timeline for the evaluation, subject to some changes:

| Stage   | Date             |
|---|------------------|
| Expressions of interest submitted                                   | 10 October 2024  |
| Shortlisted candidates informed and invited to submit full proposal | 21 October 2024  |
| Shortlisted candidates submit proposal                              | 10 November 2024 |
| Evaluation team identified and informed                             | 21 November 2024 |
| Inception phase commences   | 5 December 2024  |
| Main evaluation phase commences                                     | 5 February 2025  |
| Interim report with preliminary findings submitted                  | 1 October 2025   |
| Evaluation completed  | 20 December 2025 |

## 7. Desired Qualifications

The team should be led by one or more experts with deep, primary experience in evaluation, ideally for foundations or other philanthropic actors. This evaluation experience should ideally include:

- Experience developing indicators for social change and human rights;
- Experience measuring strategic and systemic impacts of strategic litigation beyond the actors in individual cases, and strategic and systemic impacts of legislative and policy advocacy; and
- Expertise in gathering and presenting data, including quantitative data, about social change and human rights, including experience with these issues in Global Majority regions.

Proposals should also address how the team will integrate subject matter expertise on human rights and transnational economic actors, including human rights impacts in Global Majority regions. To address this:

- If the lead evaluators are not themselves subject matter experts, we welcome team applications that include this expertise as additional consultants to advise the evaluators.
- For applications that do not include this expertise, the evaluation team and Program staff could put together a small expert advisory council to work with the evaluators after the evaluation team is selected.

In case of entities/firms, we are open to working with both for-profit and non-profit organizations.

## **8. Next Steps**

Interested consultants should submit a **2-3 page Expression of Interest (EOI)** to [evaluation@wpfund.org](mailto:evaluation@wpfund.org) with a subject line “Human Rights and Accountability of Economic Actors Evaluation” by **10 October, 2024**. The EOI should include:

- Questions you have about the scope or approaches for this EOI
- Relevant experience of applicants, specifically
  - Experience developing indicators and using them to measure strategic and systemic impacts of strategic litigation beyond the actors in individual cases; and
  - Expertise in gathering and presenting data about social change and human rights, including in Global Majority regions.
- A proposed methodology based on the information provided in this document.

Thank you for your patience and feel free to reach out to us at [evaluation@wpfund.org](mailto:evaluation@wpfund.org) if you have any questions in the meantime.

## **9. Wellspring’s Institutional Culture of Respect, Equity, Inclusion and Belonging**

Wellspring Philanthropic Fund believes we are strengthened by the diversity of consultants we work with. We welcome proposals from evaluators of all cultures, backgrounds, and experience levels.

In particular, we strongly encourage individuals or teams who are located in Global Majority regions, and/or individuals or teams who are from under-represented backgrounds in the field of evaluation, to apply.

We also encourage proposals from evaluators or evaluation firms who will include emerging evaluators or evaluators in training, including those from under-represented backgrounds in the field of evaluation. Please include relevant information in your proposal so that we can factor it into our review process.