

July 2020

# Request for Expression of Interest – Strategic Learning and Evaluation System

## 1. Background and Introduction

### 1.1. About Fondation Botnar:

Fondation Botnar is a philanthropic foundation in Basel, Switzerland. The Foundation acts as a catalyst, connecting diverse partners and investing in scalable AI and digital innovation to improve the health and wellbeing of children and young people in growing secondary cities around the world. It aims to achieve tangible impact in both shaping global agendas and generating local level change. It places considerable emphasis on generating and sharing knowledge to advance these objectives.

[www.fondationbotnar.org/](http://www.fondationbotnar.org/)

### 1.2. Aim

To develop and implement an overarching strategic learning and evaluation system (SLES) that advances internal learning within the Foundation and its partners and provides external evidence of its effectiveness and impact. This will involve: generating robust evidence of both the process and outcomes of initiatives that the Foundation supports; enabling reflexive adaptation on the basis of this evidence; assessing the impact of the initiatives and the effectiveness of the paths taken to achieve them; communicating this information to key internal stakeholders and the wider public.

### 1.3. Background

#### 1.3.1. Background

Fondation Botnar pursues a systemic and relational approach to promoting children and young people's wellbeing in developing urban environments. Acknowledging the complexity within the approach and the dynamics of social change, the Foundation emphasises the need for reflexive learning to monitor its activities in real time and adjust its strategies where required.

Fondation Botnar works with diverse strategic objectives (SO) to create systemic change. This combines direct engagement with young people and other city stakeholders, leveraging AI/Digital solutions in combination with human-centred design, and building the capacity of

system enablers and venture philanthropy to promote social enterprises. These activities are complemented by a programme of research and active advocacy towards shaping agendas at the global level.

### **1.3.2. Current Status**

The Management Office (MO) of Fondation Botnar has established and executed an initial learning agenda on the organisation-wide level, taken first steps towards an Evidence-to-Action Program, standardized its evaluation processes and begun an operationalization of relational wellbeing. The MO started with a learning agenda on the organisation-wide level to accompany the development of the still young Foundation. The learning agenda consisted of a theory of change, learning questions, and information gathering activities. The learning cycle resulted in a report and a subsequent strategy refinement approved in May 2020 by the Board.

The Evidence-to-Action Program is designed to collect evidence on the flagship OurCity initiative of the Foundation, which is a city engagement process aiming to transform secondary cities to promote children and young people's wellbeing.

Currently, the evaluation processes of mid-term and final evaluations have been streamlined to ensure complexity-responsive evaluations at a high quality to address current learning needs both of the Foundation and the funded projects themselves.

At the start of 2020, Fondation Botnar has embarked on a journey to operationalise a relational approach to children and young people's wellbeing<sup>1</sup>. This process is accompanied by a team of experts in the field and will be the foundation of any strategic learning and evaluation activities.

### **1.3.3. Looking forward**

Based on the experience of the actions above, Fondation Botnar aims to strengthen its approach in Strategic Learning and Evaluation, designing a detailed SLES concept and framework, which will be integrated within existing and new processes and supported by a decentralised data platform.

An iterative phased approach will be taken, where capacity requirements and process adjustments within each phase defines the details and requirements of the next. The main phases are:

- Inception phase (September-October 2020)

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<sup>1</sup> White, S. C. (2015). *Relational Wellbeing: a Theoretical and Operational Approach*. (pp. 1-30). Centre for Development Studies, University of Bath. <http://www.bath.ac.uk/cds/publications/bpd43.pdf>

- Phase 1. Conceptualisation and framework design (November 2020-March 2021)
- Phase 2. Establishing the SLE system in practice (April 2021-March 2022)
- Phase 3. Implementing and monitoring the SLE system (April 2022-)

## 2. Mandate Scope and Goals

The mandate envisages a long-term engagement with variations in capacity requirements, subject to the development of the project and its phases. The mandate consists of three core elements: The design of the SLES concept, the implementation of the framework and monitoring the capacity to deliver it. The team will work under the responsibility of the SLE Team and will collaborate with the SLE team in determining the deliverables.

### 2.1. Design of the Strategic Learning and Evaluation System Concept

The SLES concept should be designed to fulfil the purpose of advancing internal learning within the Foundation and its partners and providing external evidence of its effectiveness and impact. We understand ourselves as a change maker and are acting at systemic level hence we need to capture changes in the complexity of our contexts. It should be based on the principle of minimum essential data and being complexity-responsive<sup>2</sup>.

**Document:** To generate robust evidence of both the process and outcomes of initiatives that the Foundation supports and their contribution to social change. This is connected to the programme of Research.

**Learning & Improve:** To enable learning - jointly with stakeholders - and reflexive adaptation to maximise impact on the basis of this evidence; to aggregate learning across the organization and its partners; to assess the impact of the initiatives and the effectiveness of the paths taken to achieve them.

**Communicate & Leverage:** To make use of the evidence and processual learning to: establish the Foundation as a leading actor in the field of urban young people's wellbeing and digital innovation; build legitimacy and trust in the Foundation as a supportive, responsive and effective partner; catalyse broader change through inspiring other actors to adopt allied strategies. This is connected to the programme of Shaping Agendas.

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<sup>2</sup> See Bamberger, Michael & Vaessen, Jos & Raimondo, Estelle. (2016). Dealing With Complexity in Development Evaluation: A Practical Approach. 10.4135/9781483399935

The design should be based on the following principles:

- \* Principle of no-harm
- \* Keep it as simple as possible but not simpler (Minimal essential data in space and time)
- \* Fit for Context – Acknowledging that context is important
- \* Young people’s participation
- \* A relational and systemic approach (complexity responsive)
- \* Human and child rights
- \* Multisectoral/stakeholder approach

The design of the concept and framework must be carried out in close collaboration with the MO and the expert team working on the operationalization of relational wellbeing of young people. Phase 1 will be parallel to a process of defining the Foundation’s theory of change in detail in collaboration with the teams above. From the outset, the design of the SLES should also include the consideration of how a data platform can support the system.

## 2.2. Implementation and Facilitation

The scope of the mandate includes the design of the SLES, testing it and establishing it in practice, and implementing and monitoring its operations (ie all the phases set out above). The SLES will need to be integrated within existing processes and IT systems used at the Foundation. It is recognized that different skills, management and levels of capacity will be required in the different phases, and these should be indicated in the EOI.

Requirements for a potential decentralised data platform and information management services must iteratively be assessed as well as implemented.

## 2.3. Capacity Monitoring

The third element of the mandate is to monitor the capacity requirements of the vital SLES activities at a high quality and to ensure that there is sufficient capability to deliver this within the MO and its external support.

### 3. Expected Deliverables and Timeline

Deliverable	Details	Deadline
Proposal	<ul style="list-style-type: none"> <li>* description of organization, team and experience</li> <li>* outline of the proposed approach for the SLES concept</li> </ul>	21 Aug2020
Revised Proposal and Workplan	<ul style="list-style-type: none"> <li>* After the inception phase</li> <li>* Aligned with parallel running initiatives (e.g. Wellbeing operationalisation)</li> <li>* How will a detailed SLES concept and planning for phase 2 be approached</li> </ul>	30 Oct 2020
Detailed SLES Concept	<ul style="list-style-type: none"> <li>* Core elements               <ul style="list-style-type: none"> <li>● Evaluation framework</li> <li>● Learning approach</li> </ul> </li> <li>* Processes and activities required</li> <li>* Capacity and role requirements</li> <li>* Data platform requirements and options</li> <li>* Implementation plan</li> </ul>	31 Mar 2021
Implementation and facilitation	<ul style="list-style-type: none"> <li>* Creating processes</li> <li>* Integrating into existing processes</li> <li>* Documentation</li> </ul>	31 Mar 2022 continued management beyond 2021
Monitoring	<ul style="list-style-type: none"> <li>* Regular reflections after each phase including final monitoring phase</li> </ul>	Apr – Dec 2022

### 4. Guidance on How to Respond

#### 4.1. Expression of Interest

The expression of interest should be no longer than 5 pages consisting of:

- \* Introduction to the organization, team and experience
- \* Description of the approach to designing and implementing a strategic learning and evaluation system
- \* Outline Budget

The details of the approach will be further developed during the inception phase.

An annex can include further documentation such as CVs, reports and publications or other relevant documentation. The core expression of interest, however, will be the subject of any decisions made.

## 4.2. Deadline and Application Timeline

Interested teams are requested to send their expressions of interest in PDF by 21. August 2020 at 11 am CET. Applications in pdf format can be electronically submitted to [dsuhr@fondationbotnar.org](mailto:dsuhr@fondationbotnar.org)

Q&A Call	Book slot here: <a href="https://doodle.com/poll/iak6556q66fwmaq4">https://doodle.com/poll/iak6556q66fwmaq4</a>
Deadline expression of interest	21. August 2020
Interviews of shortlist	Week beginning 24. August 2020 and the following week
Feedback and possible start of the mandate	Week beginning 7. September 2020

## 4.3. Questions and Contact

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