Blue Ventures Conservation
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Terms of Reference (ToR)

External Specialist Support – Programme Evaluation in Small-Scale Fisheries and Marine Conservation

1. Background

- Blue Ventures (BV) is an international marine conservation organisation that works to rebuild coastal fisheries and safeguard marine biodiversity in partnership with coastal communities. BV supports locally managed marine areas (LMMAs), community-based fisheries management, and ecosystem-based conservation programmes across multiple countries.
- Robust monitoring, evaluation, and learning (MEL) systems are critical to understanding the outcomes and impacts of these programmes, informing adaptive management, and strengthening accountability to communities, partners, and donors.
- Blue Ventures seeks an external partner to strengthen programme evaluation, with a focus on outcome and impact analysis. This is a time-bound, capacity-building engagement to develop consistent evaluation tools, analytical methods, and reproducible workflows across programme pillars and regions.

2. Purpose of the Consultancy

- The purpose of this consultancy is to provide applied research and analytics support to strengthen BV's monitoring, evaluation and learning systems for small-scale fisheries and marine conservation programmes.
- The consultant/consultancy will co-design and document standard MEL tools, workflows, and analysis products with BV's technical team, and build internal capacity to apply them consistently across priority programmes and geographies.

3. Objectives

The specific objectives of this consultancy are to:

- Strengthen outcome and impact evaluation systems using existing indicators and data structures.
- Develop standardised analytical models and documented evaluation workflows.
- Provide practical training and guidance materials for internal teams.
- Deliver high-quality, reproducible evaluation outputs using consistent methodologies.

4. Scope of Work

Working closely with BV Global and Regional Technical Teams, the consultant/consultancy will undertake the following tasks:

4.1 Review and Improvement of Standardised Indicators

- Conduct a rapid assessment of current indicators for clarity, relevance, sensitivity, and alignment with evaluation questions.
- Recommend minor refinements or additions that enhance interpretability or analytical power.
- Standardise metadata documentation and indicator calculation notes.

4.2 Evaluation Questions and Theory of Change Alignment

The external partner will support the organisation in refining and prioritising key evaluation questions for outcome and impact analysis, ensuring they are grounded in the existing Theory of Change (ToC) while recognising that causal relationships may be complex, indirect, or not always feasible to demonstrate conclusively. The work will explicitly consider both causal and correlative pathways, using appropriate analytical approaches to assess contribution, association, and plausibility rather than simple attribution.

This task will include:

- Reviewing and strengthening the articulation of ToC pathways, assumptions, and evidence sources, including where relationships are expected to be causal, contributory, or associative.
- Refining evaluation questions to examine how outcomes change over time, how patterns vary across contexts, and how observed relationships align with expected pathways.
- Supporting the selection of analytical approaches that are fit-for-purpose given data availability, programme design, and ethical or practical constraints on counterfactuals.
- Developing practical guidance and training materials to help staff apply the ToC in a way that supports rigorous interpretation without overstating causality.

Potential questions include, but are not limited to:

- How have key ecological, social, economic, or governance outcomes changed over time in sites where programme activities were implemented?
- To what extent did specific programme components plausibly contribute to these observed changes, and what alternative explanations must be considered?
- How do changes vary across communities, regions, or participant groups, and what contextual factors explain these differences?

- Which programme inputs, activities, or conditions are most strongly associated with positive outcomes or impacts?
- What pathways link activities to outcomes and impacts, and where are these pathways strong, weak, or inconsistent?
- How robust are observed patterns to different model assumptions, sample definitions, or analytical methods?
- How do evaluation results compare to estimated counterfactuals or "what would have happened without the intervention"?
- Based on the evidence, what specific programme activities, strategies, or implementation approaches should be strengthened, adapted, scaled, or discontinued?

4.3 Data Analysis and Model Development

Develop, test, and refine statistical models using R as the primary analytical environment to assess outcomes and impacts across countries and thematic pillars, drawing on existing variables and indicators. Appropriate models will be selected based on indicator structure, data availability, Theory of Change pathways, and evaluation objectives.

Analytical approaches may include:

- Multilevel and hierarchical models
- Mixed-effects regression
- Generalised Additive Models (GAMs)
- Before/after and interrupted time-series analyses
- Difference-in-differences designs (where appropriate comparisons exist)
- Contribution analysis
- Bayesian modelling approaches
- Structural Equation Modelling (SEM) and piecewise SEM
- Principal Component Analysis (PCA) and related dimension-reduction techniques
- Tree-based machine learning methods (decision trees, random forests, gradient boosting)
- Sensitivity and robustness checks (alternative model forms, placebo tests, sub-sample analysis)

4.4 Analysis Workflow Guides

Co-develop detailed, step-by-step guides for conducting evaluation analyses using existing monitoring data. Guides must include:

- Data import procedures
- Data cleaning and validation steps
- Indicator calculation formulas
- Statistical tests and model selection criteria
- Code examples (R)
- Output formats and visualisation standards

4.5 Capacity Building

Co-design and deliver applied training (virtual or in-person) for global and regional staff on:

- Evaluation design
- Model interpretation
- Data analysis best practices
- Identifying valid comparison periods
- Reading and interpreting statistical outputs for decision-making

5. Expected Deliverables

Key deliverables will include:

1. **Indicator Review and Refinement Outputs**
   A concise summary of the indicator assessment, recommended refinements or additions, and updated indicator definitions, calculation notes, and standardised metadata templates.

2. **Evaluation Questions and Theory of Change Alignment Outputs**
   A prioritised set of evaluation questions aligned with the existing Theory of Change, including refined pathway descriptions, assumptions, and guidance distinguishing causal, contributory, and associative relationships to support rigorous interpretation.

3. **R-Based Analysis and Modelling Outputs**
   Reproducible R scripts or notebooks implementing agreed analytical models, including documentation of model choices, assumptions, and sensitivity or robustness checks, and clearly defined analytical outputs.

4. **Standardised Analysis Workflow Guides**
   Step-by-step written guidance for conducting outcome and impact analyses using BV monitoring data, covering data preparation, indicator calculation, model selection, statistical testing, and output and visualisation standards, with R code examples.

5. **Capacity-Building Materials and Delivery**
   Training materials and delivery of applied learning sessions (virtual or in-person) covering evaluation design, model interpretation, data analysis best practices, comparison approaches, and interpretation of results for decision-making.

6. Coordination with BV Teams

The consultant will co-design and co-develop deliverables with three main BV teams (outlined below), with additional coordination across other global and regional teams as needed to ensure smooth delivery of the assignment.

Programme Performance Team

- Programme Performance, which includes both the Monitoring and the Evaluation teams, will serve as the commissioning and coordination lead, guiding the definition of evaluation objectives, indicators, research questions, and Theory of Change alignment. The team will lead the contextualisation and adaptation of research questions and analytical approaches across countries and programmes, while maintaining as much standardisation as possible to ensure comparability, coherence, and organisational learning. The team will also support interpretation of findings within programme and country contexts and lead the use of evaluation insights to inform programme adaptation, learning, and decision-making

Data Science Team

- The Data Science Team leads the end-to-end data preparation and analysis implementation for Tasks 4.1–4.4, working closely with the Programme Performance team and the external partner to co-design evaluation questions, analytical approaches, and model specifications. Responsibilities include extracting, cleaning, structuring, and validating programme data; implementing indicator calculations and metadata standards; preparing analysis-ready datasets; implementing and supporting statistical models in R (including reproducible code and quality assurance); and ensuring all analyses align with BV data standards and can be rerun, updated, and maintained over time.

Training Delivery Team

- The Training Delivery team will lead the translation of evaluation outputs into practical learning resources, co-developing training materials, guidance documents, and interpretation tools with Programme Performance and Data Science. The team will ensure materials are accessible to diverse user groups and integrated into Blue Ventures' wider training and learning ecosystem to support consistent understanding and application of evaluation findings.

7. Budget

- Bidders are requested to submit a detailed financial proposal (in GBP), inclusive of all fees, taxes, and anticipated expenses, clearly linked to the proposed workplan and level of effort.

8. Required Profile and Qualifications

The selected consultant/consultancy is expected to meet the following requirements:

- Demonstrated applied research and analytics expertise in monitoring, evaluation, and learning (MEL) for small-scale fisheries and/or marine conservation.
- Combined quantitative ecological expertise with social science methods.
- Regular experience providing MEL support to NGOs, research institutions, and/or government partners, including design of indicator frameworks, outcome and impact analysis, and production of accessible reporting tools for decision-makers.
- Explicit experience working in LMMA contexts, community-based fisheries, and ecosystem management programmes.
- Proven expertise in mixed-methods impact evaluation for conservation programmes.
- Demonstrated ability to produce repeatable, well-documented statistical workflows using existing data (e.g. R, Python, or equivalent).
- Experience developing dashboards, analysis toolkits, and visualisation templates for non-technical users.
- Strong facilitation and training skills, with experience building capacity of non-technical staff, ideally across multiple countries and cultures.
- Strong written and spoken English; additional languages relevant to BV's geographies are an advantage.
- Ability to work collaboratively and remotely with geographically dispersed teams.

9. Management and Reporting

- Blue Ventures will contract the consultant/consultancy and will work under the strategic direction of the Director of Programme Performance (once in post) and/or an interim designated lead. The Programme Performance and Evaluation team will manage day-to-day coordination.
- A detailed inception report and work plan, including key milestones, deliverables, and timelines, will be agreed upon within the first month of the consultancy. Regular check-in meetings (e.g. bi-weekly) will be held to review progress, address constraints, and adjust plans as needed.

10. Location and Travel

- The consultancy is expected to be primarily remote, with virtual collaboration across BV's global teams. Any in-person workshops, field visits, or travel will be agreed in advance with BV and reflected in the financial proposal and contract terms.

11. Risks and Mitigation

Key anticipated risks and proposed mitigation measures include:

- Leadership uncertainty during recruitment of new posts – Mitigation: Phase recruitment beginning with the Director post; ensure clear interim leadership for decision-making.
- Potential duplication between consultant and staff roles – Mitigation: Develop a clear ToR and RACI (Responsible, Accountable, Consulted, Informed) matrix before contracting; maintain regular coordination and role clarity.
- Budget concerns or perceived high cost – Mitigation: Demonstrate cost-efficiency by prioritising use of existing systems and data; no redundancies or major system overhauls anticipated.
- Slow organisational adoption of new tools – Mitigation: Prioritise simple, documented workflows; provide targeted training for regional focal points; focus on usability and quick wins.

12. Ethical Considerations and Data Protection

- The consultant/consultancy must adhere to BV's safeguarding, ethics, and data protection policies. All work involving data on communities, partners, or individuals must ensure confidentiality, appropriate data handling, and informed consent where required.
- Any primary data collection (if proposed) must comply with relevant ethical standards and obtain necessary approvals from BV and, where applicable, local partners or authorities.

13. Proposal Submission Requirements

Interested consultants/consultancies are invited to submit the following:

- Technical proposal (maximum 10 pages) outlining understanding of the assignment, proposed approach and methodology, workplan, and team composition (if applicable).
- Updated CV(s) of key team member(s), highlighting relevant experience.
- Examples or links to similar MEL toolkits, dashboards, or analytical products developed for related organisations or programmes (where confidentiality allows).
- Financial proposal in GBP, including daily rates, estimated level of effort, and any anticipated expenses.
- Contact details for at least two recent clients who can provide references for similar work.

14. Evaluation Criteria

Proposals will be assessed based on the following criteria (and associated weights, if applicable):

- Relevant technical expertise and experience in MEL for small-scale fisheries and marine conservation, including LMMA contexts.
- Quality, practicality, and appropriateness of the proposed approach and methodology.
- Demonstrated ability to develop repeatable workflows, accessible tools, and effective capacity-building interventions.
- Strength and complementarity of the proposed team (if applicable).
- Value for money and clarity of the financial proposal.
- Feedback from references and past performance on similar assignments.

15. How to Apply

Please submit your proposal and supporting documents by email to Kevin.moyes@blueventures.org with the subject line "MEL Consultancy – Small-Scale Fisheries and Marine Conservation" by 16st January 2026. Shortlisted bidders may be invited to an online interview and/or requested to provide a short presentation of their proposed approach.