

Project Brief

RCF Longitudinal Impact Evaluation (2012–2026)

Proposed Scope of Work • August 2026

Budget	A maximum of €75,000 inclusive of all fees, travel, and expenses
Timeline	28 weeks (Week 1–Week 28), target launch Q4 2026, completion Q2 2027
Evaluation Period	2012–2026 (five completed grant cycles; + 2025 Annual Report as final data point)
Primary Audience	RCF Secretariat, ISC, PAP, current and prospective donors, civil society field
Evaluation Reference Group (ERG)	Steering Committee (ISC) representatives, Program Advisory Panel (PAP) representatives with RCF Secretariat coordination
Evaluator Profile	An individual consultant or small evaluation team with substantial demonstrated experience in the Global South and a strong track record of evaluating community-led advocacy, civil-society strengthening and/or human-rights programmes. The evaluator must demonstrate experience evaluating grant-making organisations, philanthropic funds or comparable civil-society financing mechanisms, including their funding models, grant structures, partnership approaches and contribution to grantee or wider-system outcomes. Experience with longitudinal or multi-cycle evaluations, participatory and mixed-methods approaches, and the global HIV and SRHR response is required.

1. Executive Summary

The Robert Carr Fund has operated since 2012, completing five grant cycles. The current 2025–2027 cycle is RCF’s sixth. Through its first five grant cycles, RCF invested US\$125 million in regional and global networks in the global HIV response led by or serving inadequately served populations (ISPs): communities disproportionately affected by HIV who face systematic barriers to health services and human rights.

This brief proposes an independent longitudinal impact evaluation covering RCF’s full operational history covering five completed grant cycles and available interim evidence from the ongoing sixth grant cycle (2025–2027) timed to coincide with RCF’s 15th anniversary in 2027. It serves three purposes: generating rigorous, independent evidence of impact; informing RCF’s strategic review and Theory of Change consultation; and supporting donor engagement and resource mobilisation through the evidence generated.)

This Scope of Work defines *what* the evaluation must achieve – its objectives, evaluation questions, evidence expectations, and deliverables – and does not prescribe *how*. Responsibility for methodological design rests with the applicant. The technical methodology proposal carries the

largest weight in selection scoring, and the full methodology will be finalized in the inception report, which requires written approval by the ERG before primary data collection begins.

Total budget: A maximum of €75,000. Timeline: 28 weeks. Evaluator profile: individual consultant or small evaluation team with substantial demonstrated experience in the Global South and a strong track record of evaluating community-led advocacy, civil-society strengthening and/or human-rights programmes. The evaluator must demonstrate experience evaluating grant-making organisations, philanthropic funds or comparable civil-society financing mechanisms, including their funding models, grant structures, partnership approaches and contribution to grantee or wider-system outcomes. Experience with longitudinal or multi-cycle evaluations, participatory and mixed-methods approaches, and the global HIV and SRHR response is required.

2. Challenge and Context

The funding landscape has fundamentally changed. For the first time since its inception, RCF is operating under conditions of genuine resource uncertainty. RCF's model was built on a commitment to multi-year core funding, with grant cycles of two to three years providing the stability that networks need to build institutional capacity, respond to crises, and pursue advocacy on community-defined terms. That commitment is now contingent on whether adequate future funding materialises.

RCF's own liquidity pressures have forced it to shorten grant periods and reduce allocations. As of the current cycle, funding commitments require realisation before they can be disbursed, and the gap between a pledge and actual funds in hand has widened materially. In the broader health and development landscape, fundraising has taken new forms where commitments and timelines are increasingly uncertain. This may require a structural shift in how RCF itself operates.

In 2025, 55 of RCF's 72 partner networks (76%) reported funding pressure as the dominant external factor shaping their work; 29 (40%) named the withdrawal of US bilateral and PEPFAR-linked support (the US President's Emergency Plan for AIDS Relief) specifically. The Global Fund's seventh grant cycle reprioritization and a below-target eighth replenishment have further compressed available resources and intensified competition. Within the RCF portfolio: 87% of partners have no core team funded for two or more years; 63% lost at least one funding source in 2025 alone; and 69% depend on a single donor for more than 30% of their income.¹

RCF is simultaneously in a period of strategic re-evaluation. Resource contraction and 14+ years of accumulated evidence create an urgent need for independent, rigorous analysis to ground strategic decisions, strengthen the case for RCF's model with donors, and inform the upcoming Theory of Change review.

3. Evaluation Objectives

Objective 1: Assess RCF's contribution to observed changes

Assess the plausibility and strength of RCF's contribution to changes in the policy and legal environment for ISPs, in access to and quality of services, and in the resourcing of community-led HIV responses. This is the primary impact assessment objective and the analytical core of the study.

¹ Robert Carr Fund, RCF 2025 Annual Partner Survey. Internal dataset, N = 72 active partner networks, 100% response rate. Data on core team funding derives from MEL Framework Indicator 1.B (Staff Structure), Results tier; see Annex C, 2025 MEL Framework Results.

The evaluation is expected to articulate evidence-backed impact statements strongly linked to RCF contributions across its lifetime. The evaluation must examine and report positive, negative, mixed and null findings where supported by the evidence.

Objective 2: Trace outcomes across the full grant history

The analysis will examine the distribution of funding and outcomes over time, including which networks, regions and ISP groups were reached, and whether systematic gaps or disparities are evident. It must assess who has benefitted most/least from RCF funding, whether some populations or geographies have been systematically under-resourced or left out, and if (and how) intersecting vulnerabilities have affected the realisation of outcomes.

Objective 3: Examine the performance and evolution of RCF's model

Assess how RCF's core funding model, participatory grantmaking approach, and grant structure have evolved across cycles and how those design choices have affected results, including what the model produced when funding was shortened and allocations reduced.

Objective 4: Assess network sustainability and resilience

Determine the extent to which RCF-supported networks demonstrate durable institutional capacity, financial sustainability, and sustained advocacy influence across and after funding periods, and what the current structural funding crisis reveals about the limits and strengths of the model.

4. Methodological Approach

This SOW does not prescribe an evaluation methodology. Applicants are responsible for proposing the methodological design they judge best suited to delivering credible, independent findings within the budget ceiling and 28-week timeline. Expressions of interest must include a technical methodology proposal that sets out:

- How the evaluation will move beyond RCF's self-reported record to independently verifiable findings, given that the secondary data record is self-reported, collected through a consistent but evolving framework, and covers only networks that received RCF funding
- How RCF's contribution to observed changes will be assessed against alternative explanations, and how the question of what would plausibly have happened without RCF funding will be addressed
- What primary data collection is proposed, and how ISP community members will be meaningfully engaged throughout (beyond being passive survey responders or interviewees)
- How the design fits within the €75,000 ceiling and the 28-week timeline, with trade-offs stated transparently
- The methodology proposal must set out: (i) how longitudinal data will be harmonised across changing MEL frameworks; (ii) a transparent sampling and case-selection approach, including exited networks and cases with positive, mixed, null or negative findings; and (iii) an evidence-strength or confidence framework for each major contribution claim.

Proposals will be assessed for consistency with the [OECD DAC Evaluation Quality Standards](#) and the [UNAIDS Evaluation Policy](#). Three requirements apply regardless of the design proposed:

- All impact findings must be framed as plausible contribution and supported by specified evidence
- The full methodology must be set out in the inception report and approved in writing by the evaluation reference group (ERG) before primary data collection begins; the ERG retains the right to request revisions
- The inception report must include a research ethics and safeguarding statement covering informed consent; do-no-harm; safeguarding; data protection, secure storage, retention and deletion; confidentiality and de-identification; risk mitigation for criminalised or politically exposed communities; language and accessibility; compensation principles; and protocols for reporting sensitive findings.

Secondary data made available to the evaluator at contract start: all annual survey datasets (2012–2025); cycle baseline and endline reports; all MEL framework versions; annual report annex tables; the 2023 Grantmaking Evaluation; RCF financial records; internal briefing documents. RCF maintains a well-archived record of its reporting raw data across cycles. Consultants are expected to collect secondary data such as PEPFAR tracking data, Global Fund replenishment records, and CIVICUS civil society space indices through public channels.

5. OECD DAC Evaluation Criteria

The evaluation applies all six OECD DAC criteria: Relevance, Coherence, Effectiveness, Efficiency, Impact and Sustainability. The criteria will be applied proportionately. Impact and sustainability will receive primary analytical emphasis, while the depth of analysis under the remaining criteria will be proportionate to the available evidence, timeframe and budget.

The coherence criterion is particularly relevant given the contraction of PEPFAR and Global Fund resources during the evaluation period.

6. Key Evaluation Questions

Questions are organized by OECD DAC criterion. Impact and sustainability are given the most depth given their primacy in the study design. The evaluator's proposed methodology must show how each question will be answered, or propose different questions with justification of proposed approach. The evaluator may prioritise questions based on feasibility and approach, this must be set out in the proposal and further agreed upon at inception.

Impact

- What difference has sustained RCF core funding made to the institutional strength, advocacy outcomes, and resilience of long-term partners, relative to what would plausibly have occurred without it?
- Has RCF core funding contributed to strengthening the wider community-led movement including in areas such as leadership, collaboration, advocacy infrastructure, knowledge representation and ability for communities to influence national decisions?
- Is there credible, independently verifiable evidence of RCF's contribution to changes in the human rights environment, service access, or resource accountability for ISPs?
- Which documented results, across which cycles and regions, offer the strongest basis for contribution claims, and what alternative explanations must be assessed?

- To what extent has core flexible funding, as distinct from project funding, been the mechanism through which impact was achieved?
- What wider systems, movements, or cross-sector areas—including effects on civic space, democratic participation, broader health systems, SRHR integration, climate-related vulnerability, or cross-movement collaboration—could RCF explore to find a credible pathway to contribution, as substantiated by evidence?

Sustainability

- What does the longitudinal record indicate about the relationship between funding duration and continuity and durable institutional, advocacy and resilience outcomes, and how confidently are any identified patterns supported by the evidence?
- What do exited networks reveal about what is retained after RCF support ends, and under what conditions?
- What are the implications for sustainability if RCF operates with shorter or more contingent funding commitments going forward?
- Beyond grant funding, what alternative sustainability approaches does the evidence support, including seed funding for profit-generating activities, and what do networks that have attempted income generation reveal about the conditions for success?

Relevance

- Has RCF's model remained responsive to the evolving priorities and operating environments of ISP-led networks across cycles and regions?
- What is uniquely valuable about rcf model or financing in the current global HIV architecture?
- What does the historical record reveal about how portfolio design choices have affected network resilience during funding crises, and what does this imply for networks operating in the 2025–2027 environment?

Effectiveness

- Across grant cycles, which outcome areas show the strongest and weakest evidence of progress, and what factors explain variation by region, ISP type, and grant structure?
- How has the progress ladder (MEL Framework) performed as a measurement tool over time, and where has it fallen short of capturing real change?
- What does the record show about the relationship between funding continuity and outcomes, particularly for networks that experienced gaps between cycles or shortened grant periods?

Efficiency

- What is the relationship between funding level, grant duration, grant type, and outcome achievement across cycles?
- What evidence is available on the efficiency and value-for-money features of RCF's model, taking account of its objectives, operating context and delivery model, and using external benchmarks only where data are genuinely comparable?

Coherence

- How consistent has RCF's Theory of Change been across cycles, and what do shifts in the model reveal about underlying assumptions?
- How well has RCF's approach aligned with and complemented other global HIV financing mechanisms, and how has the withdrawal of major bilateral funding changed that positioning?

7. Use of Findings and Strategic Decision Support

This evaluation is commissioned to produce evidence that is actively used. The evaluator is responsible for structuring findings to directly serve the decisions RCF and its stakeholders face. This is a design requirement, specified in the deliverables.

The final report must include a dedicated section structured around the following three decision areas. Each section must translate evaluation findings into specific, evidence-grounded observations that inform rather than determine decisions.

Decision area 1: Theory of Change review

Is the current ToC supported by 14 years of accumulated evidence, and where does the evidence suggest the causal logic requires revision? RCF's ToC is a deliberately simple framework; the evaluator is expected to make its implicit assumptions explicit, and to identify which major assumptions the evidence supports and which require revision. This section feeds directly into the ISC-led ToC consultation process.

Decision area 2: Next grant cycle and portfolio design

What does the evidence suggest about optimal funding duration, grant structure (e.g. single network vs. consortium), and the balance between core and project funding? Should seed funding for income-generating activities form part of the next cycle's portfolio design, and under what conditions would such approaches strengthen network financial sustainability without compromising the advocacy mandate? What does the evidence reveal about which network characteristics are associated with stronger outcomes? This section feeds into the next RFP design.

8. Indicative Timeline

The 28-week timeline below is indicative. Week 1 begins at contract signature. Applicants must propose a detailed week-by-week workplan at inception, structured around their proposed methodology. Phase overlaps are intentional to allow parallel workstreams.

Phase	Weeks	Key Activities and Deliverables
Phase 1: Inception	Weeks 1–6	Contracting; inception report covering the full methodological design, primary data collection plan, research ethics statement, and workplan; ERG written approval required before primary data collection begins
Phase 2: Secondary Data Analysis	Weeks 5–12	Full secondary-data review across the five completed grant cycles and available interim evidence from Cycle 6; longitudinal timeline construction; assessment of data gaps and their effect on confidence in findings; and preliminary pattern analysis.

Phase 3: Primary Data Collection	Weeks 10–20	Primary data collection as set out in the approved inception report, including the ISP community consultation
Phase 4: Analysis and Synthesis	Weeks 18–24	Impact analysis with the evidence basis documented per contribution claim; cross-case synthesis; preliminary findings brief to ISC and PAP for structured feedback
Phase 5: Reporting	Weeks 23–28	Full evaluation report; summary report for donor and public audiences; longitudinal dataset and codebook; final presentation to ISC and PAP

9. Success Metrics

The evaluation is considered successful when the following measurable criteria are met. These will form part of the ERG’s assessment at each phase gate.

Metric	Indicator	Type
Methodological rigor	Inception report submitted by Week 6 and approved by the ERG in writing before primary data collection begins	Process
Impact evidence quality	Contribution claims in the final report are independently verified against evidence external to the networks concerned; alternative explanations are assessed and documented; where evidence is insufficient, the report states what evidence exists, what it supports, and where confidence is limited	Output
Stakeholder validation	Preliminary findings brief is presented to ISC and PAP before report finalization; feedback is collected for final review not based on agreement or disagreement on content or findings of the report (qualitative feedback collected)	Outcome
Community participation quality	ISP community members confirm in post-consultation feedback that their input shaped analysis and interpretation, with a structured feedback form documenting specific contributions made and how they were integrated	Outcome
Deliverable completion	All required deliverables submitted within agreed timeline; longitudinal dataset and codebook handed over and accepted by RCF MEL team	Process

10. Deliverables and Payment Milestones

Payment is released against three milestones, each contingent on sign-off by the Evaluation Reference Group (ERG). ERG sign-off assesses three things: contractual completeness, meaning that the deliverable contains what the Terms of Reference specify; methodological quality, meaning that the methods applied are sound and executed as agreed; and factual accuracy, meaning that

data, figures, and references are correctly reported. Sign-off does not constitute agreement with the evaluator's findings, conclusions, or recommendations, and may not be withheld on the grounds of disagreement with them. The evaluator retains editorial independence over findings, conclusions, and recommendations throughout.

Partial or late deliverables will trigger a review by the ERG before the relevant payment is released.

All deliverables, including the longitudinal dataset and codebook, are the property of RCF. Decisions on publication and dissemination rest with RCF. The evaluator may not publish, present, or otherwise share findings independently without RCF's prior written agreement.

Milestone	Deliverables and Content	Due	Payment
M1: Inception	Inception report: full methodological design; primary data collection plan; research ethics statement; week-by-week workplan. Written approval from the ERG required before primary data collection begins.	Week 6	20%
M2: Preliminary findings	Preliminary findings brief (10–12 pages) presented to ISC and PAP; structured to receive feedback before analysis is finalized.	Week 22	30%
M3: Final deliverables	Full evaluation report (OECD DAC-compliant, 50–70 pages excluding annexes); summary report for donor and public audiences (12–15 pages); longitudinal dataset and codebook; final presentation to RCF Governance bodies, ie. International Steering Committee (ISC) and Program Advisory Panel (PAP).	Week 28	50%

11. Budget

Total budget: A maximum of €75,000, inclusive of all consultant fees, travel, subsistence, interpretation, ISP participation stipends, and respondent interview stipends. No variation above this ceiling will be considered.

Applicants must submit a detailed budget breakdown by phase, consistent with their proposed methodology, with explicit line items for:

- Evaluator fees by phase
- Data collection costs, including secure remote platforms and connectivity support for respondents where needed; any proposed in-person engagement must be itemized, justified, and contained within the ceiling
- ISP community consultation: stipends, facilitation, interpretation
- Stipends for external respondents, in recognition of the time they contribute to the evaluation
- Reporting and dataset production

Budget realism and phase allocation are scored selection criteria; the allocation must credibly support the primary data collection and community participation the applicant proposes.

12. Risks and Mitigation

Risk	Mitigation
Methodological quality varies across proposals	The technical methodology proposal carries 40% of selection scoring; the inception report is a mandatory approval gate before primary data collection begins; the ERG retains the right to require revisions
Historical data gaps	The evaluator must assess the completeness of the secondary record at inception, set out how gaps will be addressed, and document unresolved gaps with their effect on the confidence level of affected findings
Evaluator conflict of interest	Applicants must disclose any existing or prior relationship with RCF, its partner networks, or its donors at the expression of interest stage; the ERG will assess conflicts and may require mitigation measures or exclusion from specific case selection
Performative community participation	The evaluator must design the ISP consultation to produce documented, traceable analytical inputs, with a feedback mechanism that confirms to participants how their contributions were used; RCF will review the participation design at inception before approving
Political sensitivity of findings	Some findings may reflect on specific networks, donors, or policy environments in ways that carry reputational or political risk; the evaluator must discuss the approach to sensitive findings with RCF at inception and agree a protocol for how such findings will be handled, attributed, and reported
Budget ceiling	At €75,000 the evaluation requires disciplined scope management; applicants must propose trade-offs transparently and maintain scope discipline throughout; any scope change after inception requires written ERG approval
Timeline slippage	Phase overlaps are built in across all five phases; primary data collection requires the ERG's written approval before it can begin; the evaluator must notify RCF of any schedule risk within five working days of identification

13. Evaluator Qualifications and Selection

13.1 Required Qualifications

- A track record of longitudinal or multi-cycle impact evaluations in global health, civil society strengthening, or human rights programming. Strong working knowledge of the global HIV response, ISP rights, and civil society financing mechanisms, including the current funding crisis.
- Proven experience designing and implementing mixed-methods primary data collection for verification and triangulation of self-reported program data

- Demonstrated experience evaluating community-led advocacy programs, with a strong understanding of the methodological and ethical dimensions of participatory evaluation
- Demonstrated experience evaluating grant-making organisations, philanthropic funds or comparable civil-society financing mechanisms
- Prior experience applying all six OECD DAC criteria in a complex program evaluation
- Applications are encouraged from evaluators or evaluation teams based in the Global South. Where this is not the case, applicants should demonstrate substantial professional experience working in Global South contexts.

13.2 Selection Process

The evaluation will be commissioned through an open call for expressions of interest. Because this SOW does not prescribe a methodology, the technical methodology proposal is the primary basis for assessing whether an applicant can deliver the objectives, evaluation questions, and deliverables defined here. Every expression of interest must include a statement of whether the scope defined in this brief is deliverable within the €75,000 ceiling. Where the applicant judges that it is not, the statement must identify the specific trade-offs the applicant would propose. This statement is assessed under the budget realism criterion; an evasive or absent statement will count against the application.

The ERG comprises ISC, and PAP representatives with RCF Secretariat support and coordination. Throughout the evaluation, ERG members affiliated with a network involved in the study will recuse themselves from decisions concerning that network. The ERG will assess applications against the qualifications above and the following scoring criteria:

- Technical methodology proposal: 40%
- Relevant experience and track record: 30%
- Community participation design: 15%
- Budget realism and phase allocation: 15%

Applications from teams or consortia that include researchers or consultants from ISP communities are **strongly encouraged and will receive higher scores in the community participation design criterion**, which carries 15% of total scoring weight.

Annex: Acronyms and Definitions

This annex defines acronyms and technical terms used throughout the Scope of Work.

Acronyms

DAC	Development Assistance Committee. The OECD body that sets international standards for development cooperation, including evaluation quality criteria.
ERG	Evaluation Reference Group for this assignment, formed of Steering Committee (ISC) representatives, Program Advisory Panel (PAP) representatives with RCF Secretariat coordination
GC7	Grant Cycle 7. The Global Fund's seventh grant cycle, whose reprioritization reduced resources available to civil society and is referenced in this SOW as part of the changed funding environment.
ISC	International Steering Committee. RCF's governance body, responsible for strategic oversight, grant cycle decisions, and evaluation oversight.
ISP	Inadequately Served Population. Communities disproportionately affected by HIV who face systematic barriers to accessing quality health services and realizing their human rights. This includes people living with HIV, sex workers, people who use drugs, men who have sex with men, transgender people, young people, women and girls, prisoners, and migrants.
MEL	Monitoring and Evaluation for Learning. At RCF, the framework through which results are tracked and assessed across the portfolio. Monitoring and evaluation are carried out in service of learning, for RCF, its partners, and the wider field.
OECD	Organisation for Economic Co-operation and Development. The international body whose DAC evaluation criteria (relevance, coherence, effectiveness, efficiency, impact, sustainability) frame this evaluation.
PAP	Program Advisory Panel. RCF's advisory body, comprised of civil society representatives.
PEPFAR	United States President's Emergency Plan for AIDS Relief. The US government's primary bilateral HIV funding mechanism, the withdrawal of which has significantly affected the operating environment for many RCF partners.
RCF	Robert Carr Fund. The fund being evaluated. RCF provides flexible core funding to regional and global civil society networks led by or serving ISPs in the HIV response.
RFP	Request for Proposals. The mechanism through which RCF invites grant applications from networks at the start of a funding cycle. The

	evaluator will be procured separately, through an open call for expressions of interest.
SOW	Scope of Work. This document, defining the evaluation objectives, requirements, deliverables, and selection criteria.
ToC	Theory of Change. The causal framework that explains how RCF's investments are expected to produce outcomes. The evaluation will test and assess this framework against the empirical record.
UNAIDS	Joint United Nations Programme on HIV/AIDS. The UN body responsible for coordinating the global HIV response. RCF partners frequently engage in UNAIDS processes as part of their advocacy.

Technical and Methodological Terms

Attribution contribution	vs.	Attribution means claiming that a result was caused by a specific intervention. Contribution means claiming that an intervention plausibly played a meaningful role, alongside other factors. Because RCF works in complex advocacy and policy environments where multiple actors are involved, all impact findings in this evaluation must be framed as contribution claims supported by evidence.
Counterfactual		What would have happened if RCF funding had not been provided. The counterfactual cannot be observed directly; applicants must set out in their methodology proposal how their design will address this question credibly.
Inception report		The first major deliverable submitted by the evaluator, covering the full methodological plan before primary data collection begins. It must be approved in writing by the ERG before any primary data collection starts.
Longitudinal analysis		Analysis that tracks changes over time using data collected at multiple points across a period. This evaluation draws on 14 years of RCF's annual survey data and reporting to trace how networks and outcomes have evolved across six grant cycles.
Secondary data		Data collected by RCF through its annual survey and reporting processes, as distinct from data collected specifically for this evaluation (primary data). The secondary data record covers 2012 to 2026 and forms the backbone of the longitudinal analysis (final data point 2025 annual report).
Triangulation		The use of multiple independent data sources or methods to verify a finding.