



External Consultant to Co-Design Caritas Oceania Regional Advocacy Strategy

Terms of Reference

1. Introduction

Caritas Internationalis is a confederation of over 160 Members divided into 7 Regions who are working at the grassroots in almost every country of the world. Inspired by the Catholic faith, Caritas is the helping hand of the Church – reaching out to the poor, vulnerable and excluded, regardless of race or religion, to build a world based on justice and fraternal love.

Caritas Oceania is a Region of Caritas Internationalis. It comprises seven members: Caritas Aotearoa New Zealand, Caritas Australia, Caritas Fiji, Caritas Papua New Guinea, Caritas Samoa, Caritas Tonga and the Episcopal Conference of the Pacific. They come together as Caritas Oceania to work side by side on common issues, strengthen and support each other, and provide a regional voice to the international Caritas network for global action.

2. Background

In August 2019, Caritas Oceania approved a Regional Strategy Document 2020-23. A key priority identified was to strengthen our approach to environmental stewardship, including developing an approach to collective environmental advocacy within the Region.

In 2020 the scope of regional advocacy efforts expanded to include the rights of women and girls in the Pacific, in line with our commitment to amplify the voices of women and young people in our region.

As further context, Caritas Internationalis is leading the development of a global Caritas campaign inspired by Laudato Si' and Fratelli Tutti, to commence in December 2021. This global campaign will provide an overarching framework under which Caritas Oceania members can leverage our own regional advocacy priorities.

Caritas Oceania is undertaking a consultation process to identify shared advocacy priorities and to develop a regional advocacy strategy. Due to COVID-19 related travel constraints, this consultation is taking place over multiple stages using online platforms:

1. Online survey of all Member Organisations and the Caritas Oceania Youth Working Group to identify key advocacy priorities (in progress);
2. Online Planning meeting with advocacy representatives from Member Organisations to review survey findings to inform research on issues, allies and opportunities within the Region, and to use these survey findings to plan the Strategy Workshop;
3. Online Strategy Workshop(s) with the Directors, Advocacy Representatives and Youth Representatives from each Member Organisation as well as the Caritas Oceania Regional Secretariat;

4. Drafting and endorsement of Regional Advocacy Strategy.

3. Purpose

Caritas Oceania is seeking an external consultant with advocacy experience in the Pacific to co-design a 3-year Regional Advocacy Strategy. The Consultant will lead Caritas Oceania Member Organisations through a process of reflection, priority setting and action planning; while strengthening the advocacy capabilities of Caritas in our region. The resulting advocacy strategy should identify the key priorities for regional advocacy efforts, key actions or strategies, and consideration of how the strategy will be managed and its effectiveness measured over time.

4. Objectives

The key objectives of the consultancy include:

1. Developing a deeper understanding of the current advocacy approaches and priorities within each Caritas Oceania Member Organisation, and mapping potential areas for regional action;
2. Mapping existing relationships with other advocacy actors in the Region, and as well as potential networks or alliances Caritas Oceania Members could create;
3. Co-designing a 3-year advocacy strategy that identifies key advocacy priorities and approaches, and includes considerations of how the strategy will be managed, funded, implemented and its effectiveness measured.

5. Methodology

The methodology is determined by the Consultant, but should reflect the following key principles and approaches:

- *Participatory*: the process must capture the voice of all relevant stakeholders and ensure that opportunities for genuine participation, regular feedback and review are provided. While engagement with communities will not be feasible within the scope of this assignment, the advocacy strategy should provide recommendations for Caritas to promote community-led advocacy and participatory approaches.
- *Strengths-Based*: the process should identify the assets, resources, relationships and knowledge that exist within Caritas Oceania Member Organisations that can be built upon and harnessed through the Regional Advocacy Strategy.
- *Inclusive*: the process must effectively identify and address the barriers that may prevent participation, including designing accessible and interactive online workshop methodologies. Analysis of key advocacy issues and the advocacy strategy itself must include considerations of how advocacy issues intersect with other factors that may contribute to further vulnerability including but not limited to gender, disability, age, and indigeneity.
- *Empowering*: The Consultant should adopt an empowerment approach, ensuring the active involvement and accompaniment of relevant Caritas Oceania Members. In doing so, the process of co-designing the strategy should not only strengthen regional advocacy efforts, but also the individual capabilities of Caritas Oceania members and staff who will be responsible for driving the strategy forward.

6. Deliverables

6.1. Consultancy Plan

In consultation with the Caritas Oceania Regional Secretariat the consultant will prepare a consultancy plan outlining the proposed methodology, activity list, stakeholder list, budget and timeline/delivery dates (maximum 4 pages). The consultancy plan should also include a draft outline/framework for the advocacy strategy.

6.2. Context/Situation Analysis

The consultant will undertake research and analysis to draft an initial context/situation analysis (indicative length 5 pages) which addresses:

1. The scope and effectiveness of current advocacy work undertaken by the Members of Caritas Oceania. This should provide an overview of:
 - a. The current priorities, activities, strengths and assets of Caritas Oceania Member Organisations in relation to advocacy;
 - b. The existing relationships/partnerships Caritas Oceania Member Organisations have with other regional advocacy networks/coalitions/organisations;
 - c. The effectiveness of previous collaborative advocacy efforts undertaken by Caritas Oceania.

2. How Caritas Oceania is situated within broader advocacy efforts at both a regional and international level, in particular:
 - a. Analysis of key advocacy issues identified by Members, including analysis of how these intersect with other cross-cutting issues such as disability and gender;
 - b. A summary of overarching trends, good practice approaches and priorities of advocacy in the Pacific;
 - c. A summary of key advocacy networks/coalitions/organisations operating in the region, and an analysis of opportunities for alignment and/or collaboration for Caritas Oceania;
 - d. Consideration of potential links to global advocacy efforts, in particular those of the Caritas Confederation and Catholic Church more broadly.

It is expected that the initial context analysis will be further refined throughout the consultation process, and a final version incorporated into the Regional Advocacy Strategy. A preliminary survey is being undertaken by the Caritas Oceania Regional Secretariat and findings will provide the Consultant with an initial data set for this analysis. Additional consultation required should form part of the proposed methodology.

6.3. Co-Design Strategy Workshops

The consultant will plan and facilitate online co-design workshops, initially a validation and planning workshop with key advocacy representatives; followed by strategy workshops with the broader Caritas Oceania membership. The purpose of these workshops are to:

- a. Present findings of the initial situation analysis and seek validation/feedback from representatives;
- b. Build awareness of key issues impacting communities in the Oceania Region, especially those identified as priorities for Caritas Oceania;

- c. Build awareness of other key actors, trends and good practice approaches evident in the Oceania Region and explore opportunities for Caritas Oceania;
- d. Identify and further understand both individual and shared advocacy priorities across CO members;
- e. Co-design a collective advocacy strategy based on these shared priorities;
- f. Determine the best approach for managing/implementing the strategy within the Caritas Oceania structure.

The consultant should determine the most effective approach, and may suggest more than one session with the broader Caritas membership to complete this phase.

6.4. Caritas Oceania Advocacy Strategy

Using findings and recommendations from the previous stages, the consultant will draft a regional advocacy strategy, engaging CO advocacy representatives as required. The framework for the Regional Advocacy Strategy will be refined in consultation with Caritas Oceania, however should include at a minimum:

- context /situation analysis
- stakeholder analysis and identification of allies
- identification of advocacy priorities, objectives and indicators
- advocacy approach
- target activities
- implementation plan
- management/oversight mechanism
- advice on cost implication

The Strategy must take into consideration, and be achievable within the capacity and resources of Caritas Oceania Member Organisations and the Regional Secretariat. The consultant may provide recommendations of how additional resourcing could strengthen regional advocacy efforts.

The first draft of the strategy will be reviewed by the CO Regional Commission and Advocacy Representatives, with feedback to be incorporated into the final version. The Consultant will present the final strategy to the CO Regional Commission for endorsement.

7. Skills & Experience

- Demonstrated experience in advocacy, policy, campaigning and strategy development in the Pacific;
- Demonstrated experience in facilitating consultative discovery processes and supporting group decision-making processes, ideally with an advocacy focus;
- Experience working with faith-based organisations or good knowledge of the role of Churches in Pacific advocacy will be highly regarded;
- Good research, analytical, reporting, presentation and drafting skills;
- Excellent communication and facilitation skills, including cross cultural communication;
- Knowledge of key regional/global forums, processes and advocacy opportunities;
- Knowledge of Catholic Social Teaching will be highly regarded.

8. Timeframe

The Regional Advocacy Strategy will be presented and endorsed at the Caritas Oceania Annual Forum which will be held in late July 2021. The consultant should provide an

overview of the proposed time frame and number of days required for each deliverable in their Expression of Interest.

9. Travel

This is a home-based assignment with all activities completed online. There will not be any travel required.

10. IT requirements

The facilitator will need to have sufficient internet reliability and speed to enable participation in the online meetings and workshop.

11. Consultancy Management

The Consultancy will be managed by the Caritas Oceania Regional Secretariat, with the Consultant reporting directly to the Caritas Oceania Regional Coordinator.

This consultancy is supported by Caritas Australia. As such the Consultant must be willing to comply with Caritas Australia's safe recruitment procedures and Code of Conduct. Any breach of the Policy or Code of Conduct may result in suspension or termination of the consultancy.

12. How to submit an Expression of Interest

Applicants should submit a simple Expression of Interest to Puletini Tuala, CO Regional Coordinator on CO alofa.oceania@gmail.com that includes:

- Proposed methodology and timings for each phase of the consultation process and your rates;
- An outline of your previous experience relevant to this Terms of Reference;
- An indication of your available dates for the Planning Meeting and Strategy Workshop; and availability to complete the consultancy within the specified time frame.

Expressions of Interest should be submitted by 9am (Apia time) on Wednesday 19th May. EOIs will be reviewed on a rolling basis.