



TERMS OF REFERENCE FOR INEQUALITY CAMPAIGN EVALUATION

Ten Years of Campaigning: 2014-2024

Programme/Project	Inequality Campaign
Geographical coverage: global; regional; country(ies)	Global
Programme timeline	2014-2024 (period for the evaluation)
Evaluation Commissioning Manager/s	Victoria Harnett, Head of Campaign Strategy Deepak Xavier, Head of Inequality, Economic, and Climate Justice
Target Stakeholders to be involved	Executive leadership across the Oxfam confederation; Advocacy, Campaigns, Influencing and Fundraising teams at the Oxfam International Secretariat and key affiliate and country program teams; Aligned global programme management teams (GINI, FAIR, OCI, for example); Institutional donors
Closing Date ³¹	17 August 2026
Evaluation Timeline	September 2026–May 2027

1. BACKGROUND

The Even It Up campaign (rebranded in 2019 to the Inequality Campaign) is a global campaigning initiative focused on fighting extreme inequality. The strategic plan for 2015–2019 outlines a vision to implement progressive policies grounded in the view that extreme inequality driven by political capture is a barrier to ending poverty.

The campaign is diverse and disperse; bringing together campaigns and advocacy initiatives aimed at multiple targets from across multiple countries and regions, on a range of themes (see below) relating to inequality, while also influencing global-level targets and audiences around the world.

Core Campaign Objectives

The strategy is built around four primary objectives:

1. Shifting the Terms of Debate: Building a global consensus that the gap between the rich and the rest is unacceptable and requires radical reform.
2. Citizen & Civil Society Voice: Increasing the number of citizens and organizations influencing decision-makers to combat inequality.
3. Policy & Practice Change: Winning "game-changing" reforms in areas like progressive taxation, free public services, decent wages, and curbing political capture.
4. Internal Excellence: Modeling the "one programme" approach with 50/50 North–South leadership and strong gender expertise.

Theory of Change

Oxfam identifies "political capture" and the "capture of ideas" (market fundamentalism) as the primary drivers of inequality. To break this cycle, the campaign focuses on empowerment:

- Changing Attitudes: Convincing the public that inequality is a choice, not an inevitability.
- Strengthening Alliances: Building critical mass through partnerships with unions, CSOs, and influential "unlikely suspects".

Key External Trends & Challenges

Oxfam identifies several critical factors influencing the work:

- The "Capture" of Narrative: While inequality is now a mainstream topic, vested interests are attempting to co-opt the narrative without offering real solutions.
- Shrinking Civil Society Space: Governments are increasingly using legislation and regulation to diminish the voice of the political opposition and NGOs.
- Privatization of Public Services: A dangerous trend toward privatizing health and education, which disproportionately harms women and people living in poverty.
- Economic Risks: The high risk of further financial crises necessitates a flexible "day two" response strategy.

Strategic Priorities

The campaign focuses on three areas:

- Challenging Inequality Ideology: Arguing that change is possible through tangible solutions.
- Fighting Privatization: Highlighting public services as the primary solution to economic inequality.
- Corporate Taxation: Demanding radical reform of global tax rules.

With the following cross-cutting themes:

- Gender: Mainstream gender analysis across all economic inequality work.
- Active Citizenship: Supporting citizen-led platforms to hold governments accountable.
- Development Finance: Focusing on the unique value of Official Development Assistance (ODA) as a catalyst for poverty reduction.

Timeframe of Campaign

The timeframe for the Inequality Campaign Strategic Plan was extended through 2024. In this extended period, the campaign added a focus on climate change as a driver of inequality with elites bearing significant responsibility for climate change. Additional intersecting issues of food and land rights were also incorporated at the same time. In October 2024 colleagues convened in Mexico City to draft a new strategic plan for 2025-2030.

2. PURPOSE AND SCOPE OF THE EVALUATION

A ten-year period for campaigning is sufficient and significant for evaluating efforts to bring about social systemic change to observe outcomes of efforts and whether they have contributed to any systemic changes and social impact.

Focus will be on use of narrative change on inequality as the entry point to contributing to systemic change that leads to systemic changes in conditions that create or sustain inequality, and in turn lead to empirical improvements (decreases) in economic and gender inequality in societies.

Possible themes/issues of focus:

- Economic inequality
- Fiscal and tax justice
- Gender equality
- Public services
- Climate justice

3. USE AND USERS OF THE EVALUATION

The primary use for this evaluation is to share the findings on the achievements of using campaigning focused on narrative and mental models change on inequality as the entry point for systems change. The evaluation will be used to indicate changes in narrative and mental models on inequality in Oxfam's Inequality Campaign and what these narrative changes have led or contributed to in terms of changes in structural and relational conditions required to bring about systemic change. Findings will provide an understanding of what approaches to narrative change and use of inequality framing contributed to achieving and how these changes happened over time.

- Primary Audience: External stakeholders with interest in addressing inequality. The Campaign Team seeks to share findings with the donor community to include donor governments, key philanthropic foundations, individual donors and supporters. The evaluation will be used to show what change is possible, considering the context, through campaigning targeting narrative change in relation to conditions of inequality.
- Secondary Audiences: Internal stakeholders with decision-making responsibilities on investment in campaigning on inequality both in countries and at the secretariat. The evaluation will provide findings on the achievements made from the investment in campaigning on inequality over 10 years. Findings can assist in investment decisions for the future.

4. KEY EVALUATION QUESTIONS

The following questions are indicative. They will be refined by the selected evaluators during the Inception Phase.

- Can coordinated efforts in the form of a campaign use narrative change as an entry point to bringing about systemic change in addressing inequality?
 - How has the understanding of inequality evolved in public debate and discourse over the course of the Inequality Campaign?
 - (How) Has the Inequality Campaign contributed to changing the narrative on inequality globally and in specific country contexts in ways that have led to increasing political will to address inequalities?
 - What has been the most effective efforts at bringing about narrative change? Which actions and when make a difference?
 - What has the investment in an annual flagship report delivered? Is it worth the investment?
 - What are the conditions within which campaigning targeting narrative change is more likely to be effective?
 - Have changes in global narratives on inequality contributed to changes in structural and relational conditions affecting inequality in countries? Is Oxfam (global) machinery making it possible for Oxfam country efforts?
 - How has the Campaign adapted, objectives, strategically and tactically over this period, How and Why?
- How does collective action feature in narrative change?
 - How has alliance- and coalition-building and increasing (or mobilizing?) civic engagement on inequality featured in narrative change on inequality for the Inequality Campaign?
 - How has collaboration and partnership with organizations and intellectual leaders contributed to the evolution on public understanding of inequality?
 - How has Oxfam's inequality campaign contributed to the "inequality mass movement?"

5. SUGGESTED METHODOLOGY AND APPROACH

Approach to the Evaluation of the Inequality Campaign

The methods outlined below are indicative. The methodology and approach will need to be finalized with the evaluators as part of the Inception Phase of this evaluation. During the Inception Phase the evaluators will determine with Oxfam how to best design a mix-method approach that will produce a set of findings in narrative form that can easily be shared publicly and is grounded in analysis with a degree of rigor for credibility. The following methodology outlined for this evaluation will be considered for feasibility and appropriateness for answering the evaluation questions.

Conceptual Framework—Conditions for systemic change¹

Because the goal of the campaign has been to address inequality as a systemic problem, the evaluation must be conceptualized in terms of understanding contributions towards systemic change. In *The Water of Systems Change*, Kania, et al provide a succinct conceptual framework for thinking through and assessing systemic change. They outline the necessary types of factors or conditions that require reform or addressing to lead to the more resilient or even transformational change of systemic change. There are six conditions across three types of change to bring about systemic change—

- in structural change conditions include policy, practices, and resources
- in relational change conditions include relationships and power dynamics
- in transformative change conditions include mental models (narratives and social norms)

For the purposes of this evaluation, we have identified the effort to influence and reshape mental models in the form of narratives on inequality as the entry point into systemic change. The evaluation will need to assess the efforts of reshaping narratives on inequality at the global level in terms of both the success in contributing to changing narratives on inequality and how these changes have contributed to changes in the other conditions required for systemic change.

Contribution Analysis and Case studies

To analyze for the contribution of the campaign in bringing about narrative change and whether in turn such narrative change has contributed to other structural and relational conditions the evaluation will use the following key question and working hypotheses:

- Key question:
 - Can narrative change serve as an entry point into systems change, bringing structural and relational changes in political economic systems?
 - How can the global efforts of narrative change on inequality lead to (contribute to) structural and relational changes in countries?
- Working hypotheses—
 - Working hypothesis #1: Providing an alternative narrative through a coordinated effort in the form of an issue-based campaign can change the dominant narrative underlying and sustaining political decisions and political economics systems.
 - Working hypothesis #1a: Coordinated efforts to provide an alternative narrative on inequality can disrupt and change mental models or mindsets.
 - Working Hypothesis #2: Narrative change can lead to structural changes and changes in power dynamics.
 - Working Hypothesis #2a: Expanding exposure, reach, and use of alternative narratives on inequality can lead to structural changes and changes in power dynamics that redress inequalities in political economic systems.

To assess for the campaign's contribution to narrative change on inequality, evaluators will need to determine if a baseline for narratives on inequality in the public space prior to 2014 exists or can be established. The

¹ See Kania, J., M. Kramer, and P. Senge, *The Water of Systems Change*, FSG, 2018.
https://www.fsg.org/resource/water_of_systems_change/#resource-downloads

Inequality Campaign did generate a narrative baseline for the campaign. This evaluation will build on that baseline created and strengthen it or fill in gaps if needed upon review.

- Contribution analysis—will be used to outline the challenges in establishing attribution in the relationships between campaigning and influencing, narrative change, and subsequent structural and relational changes in addressing inequality in political economic systems.
 - Specific results chains will be established and a “storyline” created based on the working hypothesis above through key stakeholder engagement and review of existing campaign documentation.
 - Evidence will be gathered and analyzed as outlined in below methods of analysis and data collection methods to substantiate the storylines.
- Discourse analysis—To determine the contribution of the campaign’s efforts in narrative change on inequality discourse analysis will be used combined with Process tracing (below). Discourse analysis will enable the exploration of how the language of existing narratives shapes and is shaped by context. It will enable exploring how meaning, power dynamics, and social structures are constructed, disrupted, and changed.
- Cases of Effort
 - Using the above result chain-based storylines, cases will be used to explore how inequality campaigning contributed to narrative change on inequality and how the use of narrative change in campaigning can contribute to changes in other critical conditions for systemic change. Cases will be grounded in efforts at change and will entail global and national components, enabling the exploration of the linkages between global and national effort at social change.
 - Cases of Effort Selection Criteria
 - Solid evidence base of some success (Gaps will exist to be filled through the evaluation but have material to work to create a case).
 - Approach: focused on narrative change/shifting terms of debate or using global effort at narrative change.
 - Use of the global narrative change work in the (cross)-national/country level work.
 - “Opportunity of Change”—constitutes a key moment or opportunity seized to ignite action Equality narrative work as an inspiration (think about this to add something).
 - Substantive focus must include: economic inequality, and progressive taxation tax policy, gender equality, access to vaccines, or public services.
 - Equality narrative changes as inspiration: an effort was initiated based on inspiration from other uses of inequality framing and changes in narratives.
- Process tracing—will be used to determine the contribution to narrative change at the global level and linked efforts at systemic change to address inequality process tracing will be used to both follow the global effort at narrative change and the chain of events in the cases of efforts selected, analyzing data from interviews and documents. Types of data that will be included in analysis to empirically establish the steps of the process in cases of effort include:
 - “Cases of Effort-centric” narrative analysis—to build a detailed, chronological account of the “opportunity of change” to understand the specific context and sequence.
 - Triangulation of data that will include data from interviews, documents, and outcome statistics gathered on outputs and activities.
 - Will need to determine if can use Bayesian Probability Analysis or Casual Evidence Testing.

Data collection methods

To effectively answer the key evaluation questions—particularly how the campaign shifted mental models and whether global narrative changes catalyzed country-level structural or relational changes—the evaluation team will deploy a mixed-methods data collection strategy.

Data collection will be categorized into three distinct lines of evidence:

1. Qualitative In-Depth Inquiries

- Key Informant Interviews (KIIs):

- *Target Groups*: Executive leadership across the Oxfam confederation, global campaign strategy heads, affiliate/country program teams, institutional donors, aligned program managers (GINI, FAIR, OCI), and external intellectual leaders or coalition partners.
 - *Focus*: Interviews will gather localized and high-level insights on how the campaign adapted tactically over the 10-year period, how partnerships expanded exposure to alternative narratives, and the internal/external factors influencing political will.
- Case of Effort-Centric Focus Groups:
 - *Focus*: If requested or desired by key informants within selected country cases, focus groups will be conducted to construct detailed, chronological accounts of specific "Opportunities of Change". These sessions will focus heavily on how global inequality framing was adapted to national realities to spark collective action.

2. Document and Content Compilation

- Comprehensive Document Review:
 - *Internal Materials*: Multi-year Inequality Campaign Strategic Plans, the Even It Up (EIU) Campaign Report, internal monitoring, evaluation, and learning (MEL) document subsets, and localized campaign materials from selected national cases.
 - *External Materials*: Global and national policy declarations, legislative transcripts, independent news archives, and intellectual publications referencing Oxfam's inequality framing.
- Discourse Baseline Mapping Text:
 - *Focus*: Gathering historical public space text and media archives to build upon and fill gaps within the campaign's pre-2014 narrative baseline. This specific dataset will feed the *Discourse Analysis* to evaluate how language shifting altered dominant macroeconomic or public services mindsets over the 10-year timeline.

3. Quantitative Metric Trackers

To support the contribution analysis and establish empirical backbones for the case study "storylines," quantitative data literacy methods will extract and aggregate secondary statistics across the following buckets:

Data Category	Specific Metrics to be Collected
Public & Supporter Engagement	* Number of people reached digitally/physically * Number of report downloads (e.g., major flagship inequality reports) * Number of petitions signed * Total number of active campaign supporters
Media Reach & Influence	* Volume and tone of media hits/press mentions globally and nationally * Citations of Oxfam framing by intellectual and political leaders in public spaces
Resource Mobilization	* Number of new institutional and individual donors attracted to inequality-focused programming
Policy & Structural Progress	* Number of new progressive policy drafts, formal policy reforms, or international declarations enacted regarding progressive taxation, public services, and gender equality

Methodological Application of Collected Data

All data points collected through these methods will not sit in silos; they are explicitly designed to feed into the following analytical tracks:

- Process Tracing: The chronological mapping of interviews and documents will be used to establish empirical steps in a clear chain of events, tracking whether global messaging accurately links to national-level systemic shifts.

- Triangulation: Quantitative statistics (like petition counts or policy changes) will be systematically crossed with qualitative interview data to test the validity of the *Working Hypotheses* and determine if causal link models (such as Bayesian Probability or Causal Evidence Testing) can be successfully run.

Definitions to set for evaluation:

This is not an exhaustive list. The evaluators will determine the full set of definitions required for the evaluation,

- Mobilization
- Public engagement
- Civic engagement
- Supporters
- Public space/sphere
- Power dynamics
- Narrative
- Narrative change
- Systemic change
- Political Will
- Collective Action

6. ETHICAL & SAFEGUARDING CONSIDERATIONS

- There are risks in conducting interviews. Participants may have difficulties taking the time to be interviewed amidst care and other responsibilities or face technical difficulties. The evaluators and Oxfam are required to work closely with our partners to continuously identify, assess, and monitor potential risks and unintended negative consequences, and decide if and how we should move forward with the data collection.
- Further limitations may include partners' hesitation to provide open and critical feedback to Oxfam while still being in grant partnership with us. In addition, care will be taken to maintain safe programming and safeguarding. Evaluation participants will be provided with the necessary information about the objectives and use so that they can provide their informed consent (with the option of being able to retract it if the need arises) and will be provided with the mechanisms available to them in case a problem arises (Ethics Point, etc.).
- Lastly, this evaluation will follow responsible and ethical data policies, including informed and voluntary consent. Interviewees will have the option to be anonymous if they so wish and may opt out of the project at any time. Data will be stored safely – with identifying information removed if requested – and will be deleted when no longer needed.
- Compliance to Oxfam research, evaluation ethical standards and safeguarding standards is required.
- Evaluators will review and use Oxfam International Evaluation Policy
<https://www.oxfam.org/en/research/oxfams-policy-program-evaluation>

7. MANAGEMENT AND COORDINATION OF THE EVALUATION

The Evaluators will be responsible for following:

- Inception Phase
 - Review necessary materials
 - Design and facilitate inception workshop
 - Draft Inception Report—includes refined approach, evaluation questions, working hypotheses, methodology and final format of product
- Implementation Phase:
 - Data Collection Activities
 - Data Analysis and Interpretation
 - Validation Workshop Design and facilitation of workshop
 - Report Writing

Oxfam will be responsible for the following:

- Inception Phase
 - Inception Workshop—will review design of workshop and provide feedback. Will handle logistics of organizing the workshop
 - Finalization of working hypotheses and research questions—through review of consultants proposals and discussion as needed
- Implementation Phase:
 - Data Collection Activities—will provide names for key informant interviews and handle scheduling of interviews
 - Peer Review and Validation Workshop—will manage peer review process. Will review design of validation workshop and provide feedback. Will handle logistics of organizing workshop
 - Approval of Final Report—will review revised final report and sign-off

8. EXPECTED DELIVERABLES AND OUTPUTS

- Inception Report: Outline of Refined Methodology and Format of final Product—this includes definitions of key concepts, working hypotheses, research questions, approach to analysis, data collection methods, and methods of data interpretation, and format of final report. Refinements to what is outlined in the ToR are understood as part of the evaluation inception process with the consultant. Refinements will be reviewed, discussed if needed, and finalized by Oxfam with the consultant.
- Project Management Plan—should provide an outline of the activities involved, who is responsible, and timeline. This product will be created in consultation with Oxfam.
- Draft Evaluation Report—length will be agreed between consultant and Oxfam
- Validation Workshop—Consultant will design and facilitate to receive input and feedback in the form of peer review through discussion by key Oxfam stakeholders. Oxfam team will collaborate on finalization of approach to workshop.
- Final Report—length and format will be agreed to based on discussion between consultant and Oxfam and based on feedback from validation workshop. Final report will include stand alone Cases of Effort stories.

9. TEAM COMPOSITION AND QUALIFICATIONS

- Skilled in qualitative and quantitative methods.
- Experience or familiarity with contribution analysis, discourse analysis, and process tracing.
- Experience integrating gender analysis and data collection methods into other methods of analysis and data collection.
- Quantitative data literacy and experience working with quantitative data.
- The evaluation team may include MEL staff from Oxfam to work in collaboration with the consultants. The consultants will maintain independence in their responsibility for the overall data analysis, data interpretation, and write-up in the form of the final report.
- Fluency in English required.

10. APPLICATION PROCESS AND HOW TO APPLY

Interested consultants should submit the following:

- An expression of interest to include:
 - Indication of why you are interested in the evaluation
 - What skills and experience you bring to the evaluation
 - Thoughts on the evaluation as outlined, including the proposed methodology
 - Any changes that you would make to the approach
 - Indication of your rate expectations
- A resume
- Optional: a list and brief description of past experience with similar or relevant projects
- Deadline for applications: Monday, 17 August, 2026

- Send applications to: Victoria Harnett at Victoria.harnett@oxfam.org