

Terms of Reference

Development of the CCY Research, Learning, Advocacy and Influence Strategy 2026–2029

Cash Consortium of Yemen (CCY)

Assignment	Development of the CCY Research, Learning, Advocacy and Influence Strategy 2026–2029
Indicative duration	30–35 working days over approximately 8–10 weeks
Reporting line	CCY Chief of Party, with technical input from relevant CMU and consortium member functions
Primary strategic anchor	CCY Strategy 2026–2029, particularly Strategic Objective 4 and the Year 1 Roadmap
Geographic focus	Yemen, with relevance to CCY's engagement in the wider global cash programming community

1. Background

The Cash Consortium of Yemen (CCY) is a coordinated platform for the delivery of multi-purpose cash assistance (MPCA) and related programming across Yemen. Under its 2026–2029 Strategy, CCY seeks to sustain high-quality MPCA at scale while strengthening the contribution of cash programming to resilience, protection and recovery; advancing locally led delivery and leadership; and becoming a more learning-driven and evidence-informed consortium.

The strategy defines four Strategic Objectives: (1) leverage high-quality, timely, predictable and shock-responsive MPCA at scale to achieve humanitarian outcomes for crisis-affected households; (2) strengthen the contribution of cash programming to resilience, protection and recovery outcomes through a shared resilience framework and complementary, sequenced approaches; (3) increase locally led delivery and leadership within CCY by expanding the role and influence of Yemeni NGOs and deepening linkages with national institutions and systems; and (4) position CCY as a learning-driven consortium that uses evidence to influence decision-making, standards and practice in Yemen and global cash programming.

Strategic Objective 4 represents a deliberate shift in CCY's approach to research and learning. The strategy notes that, although CCY has produced strong analytical outputs, research and learning have not always been guided by a structured agenda or consistently linked to programming decisions. It therefore commits CCY to developing a more intentional and forward-looking research framework that identifies priority learning questions while retaining flexibility to respond to emerging donor interests, contextual shifts and operational opportunities.

The strategy also makes clear that evidence generation should serve both internal decision-making and external influence. Research and operational learning should inform programme adaptation and strategic direction while also being translated into advocacy, operational guidance, sector standards and wider cash programming practice. This includes engagement through platforms such as the Cash and Markets Working Group (CMWG) and systematic dissemination of research and learning products in Arabic and English.

The Year 1 Roadmap further calls for a consortium-wide research and learning agenda aligned with CCY's Strategic Objectives, with priority questions including MPCA effectiveness, resilience pathways, localisation and delivery in constrained environments. It also requires processes to ensure that evidence is systematically translated into advocacy and policy engagement, including clear influence priorities, target audiences and dissemination formats.

2. Purpose of the Assignment

The overall purpose of the consultancy is to establish a coherent and actionable framework through which CCY can:

Generate the right evidence → learn from it systematically → apply it to programming → translate it into targeted advocacy and influence.

The consultancy should enable CCY to move from largely opportunity-driven research and advocacy toward a strategically prioritised evidence-to-influence model, while retaining sufficient flexibility to respond to emerging humanitarian, operational and donor priorities.

The strategy should clarify:

- What CCY needs to know – priority research and learning questions.
- Why CCY needs to know it – the connection to programme, strategic and policy decisions.
- How evidence should be generated – appropriate research, learning and analytical approaches.
- How evidence should be used internally – decision-making, programme adaptation and quality improvement.
- What CCY wants to change externally – priority advocacy and influence objectives.
- Who CCY needs to influence – audiences, stakeholders and decision-makers.
- How CCY should influence them – messages, products, platforms, partnerships and engagement approaches.
- How CCY will know whether its research and advocacy are making a difference.

3. Specific Objectives

Objective 1 – Establish CCY's strategic research and learning priorities

Develop a structured research agenda aligned with CCY's four Strategic Objectives, identifying the evidence required to address operational, programmatic and policy questions over 2026–2029. The framework should distinguish between:

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| • Core strategic research | • Routine evidence generated through MEAL and implementation |
| • Operational research | • Rapid or opportunity-driven research |
| • Programme learning and evaluations | • Donor-responsive research |

This distinction should allow CCY to maintain strategic coherence while responding to emerging opportunities and donor priorities.

Objective 2 – Develop an evidence-to-action framework

Define how evidence generated through research, MEAL, market monitoring, PDMs, community feedback, pilots and implementation experience should feed into programme and strategic decision-making. The framework should establish practical mechanisms for:

Field evidence → analysis → learning → decision → adaptation → documentation → external influence

This should include clear feedback loops between CCY partners, technical functions, the CMU and governance structures.

Objective 3 – Define CCY's advocacy and influence priorities

Identify a limited number of strategic issues where CCY has the evidence, legitimacy, operational footprint and comparative advantage to influence humanitarian policy and practice. The consultancy should focus on specific changes CCY wants to see in policy, funding, coordination, standards or operational practice, rather than producing a generic communications strategy.

Objective 4 – Map audiences and pathways to influence

Identify priority audiences and decision-makers and establish appropriate influence pathways for each. This should consider, as relevant:

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| • Donors | • International NGOs and consortia |
| • Humanitarian leadership and coordination structures | • Development actors and international financial institutions |
| • CMWG and other technical coordination platforms | • Research institutions and academia |
| • UN agencies | • Global cash policy, learning and coordination platforms |
| • National institutions and social protection actors | |
| • Yemeni NGOs and civil society | |

Objective 5 – Strengthen Yemeni participation in research and influence

Define practical mechanisms through which Yemeni NGOs, staff, researchers, academia, civil society and affected communities can participate in defining research questions, generating evidence, interpreting findings and shaping advocacy priorities. The approach should support CCY's localisation objective by moving beyond consultation toward meaningful co-production and ownership where feasible.

Objective 6 – Establish an implementation and measurement framework

Develop a realistic system for planning, prioritising, resourcing, governing and measuring CCY's research and advocacy work over the strategy period, including indicators for evidence generation, uptake, influence and programme adaptation.

4. Scope of Work

Component 1 – Evidence and Research Landscape Review

Review CCY's existing evidence base, research products, evaluations, MEAL outputs, learning products and advocacy work. The review should assess:

- What evidence CCY already has and how it is currently organised and accessed.
- Major evidence gaps against the 2026–2029 Strategic Objectives.
- Potential duplication with research produced by other Yemen actors.
- Areas where CCY has a comparative evidence advantage because of its scale, geographic footprint, harmonised systems, operational access or longitudinal programme data.
- How previous CCY research has been used for programme decisions, donor dialogue, coordination or advocacy.
- Accessibility and usability of existing evidence for different internal and external audiences.
- Opportunities to use existing programme, MEAL, market and accountability data more strategically.

The exercise should avoid creating a research agenda based only on interesting research topics. Research priorities should be assessed primarily according to their decision and influence value.

Component 2 – Research and Learning Agenda 2026–2029

Develop a prioritised multi-year research agenda mapped against SO1–SO4. At minimum, the agenda should examine the research domains identified or implied by the CCY Strategy and Year 1 Roadmap.

The consultant should develop a research prioritisation matrix that scores potential studies against criteria such as: strategic relevance, evidence gap, decision value, advocacy potential, feasibility, cost, urgency, ethical and protection considerations, and uniqueness of CCY data or access.

Component 3 – Advocacy and Influence Strategy

Develop a clear set of advocacy and influence objectives derived from the CCY Strategy and research agenda. For each priority advocacy issue, the strategy should define:

**Issue → Evidence → Desired change → Target audience → Key message → Messenger → Influence channel →
Timing/opportunity → Indicator of change**

Potential strategic areas to be explored, rather than predetermined as final advocacy positions, should include:

- Continued investment in MPCA as a core humanitarian modality.
- Predictable and multi-year funding for cash programming.
- Appropriate duration and predictability of MPCA.
- Value for money and effectiveness of consortium-based cash delivery.
- Protection outcomes associated with cash programming.
- Humanitarian access and maintenance of delivery in constrained areas.

- Localisation and locally led cash programming.
- MPCA/HFA and broader programme articulation.
- Cash–livelihoods–resilience pathways.
- Linkages between humanitarian cash and social protection.
- Harmonisation, interoperability and reduced duplication.
- Evidence-based targeting and transfer values.
- Accountability and protection in cash delivery.

The consultancy should recommend which of these areas CCY should actively advocate on and which should remain primarily research or technical-learning questions.

Component 4 – Stakeholder and Influence Mapping

Undertake a stakeholder and influence mapping relevant to CCY’s research and advocacy objectives. For each priority stakeholder, assess:

Interest | Influence | Current relationship | CCY credibility/access | Evidence needs | Desired change | Best engagement route | Appropriate messenger

The analysis should recognise Yemen’s political and institutional fragmentation and differentiate engagement approaches where necessary across different operating environments.

Component 5 – Research-to-Advocacy Architecture

Develop a practical system ensuring that research does not end when a report is published. Each major research product should have an associated Evidence Uptake Plan that considers, as relevant:

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| • Internal decision brief | • Arabic-language summary |
| • Operational recommendations | • Presentation or slide deck |
| • Donor briefing | • External publication |
| • Advocacy brief | • Global learning product |
| • CMWG technical discussion | • Targeted bilateral engagement |
| • Policy note | |

The architecture should reflect the CCY Results Framework, which measures not only research production but also whether evidence is used in programming or advocacy and whether CCY contributes to operational guidance, standards, coordination practices or donor approaches.

Component 6 – Governance and Ways of Working

Recommend clear responsibilities across the following functions and bodies:

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| • CCY Steering Committee | • Grants / Partnerships |
| • Chief of Party / CMU | • CCY member organisations |
| • Programme and technical leadership | • Yemeni partner organisations |
| • MEAL | • CMWG engagement and other external coordination functions |
| • Information Management | |
| • Economic Recovery | |

The consultant should propose a practical process for:

Research question identification → prioritisation → approval → commissioning → technical oversight → validation → dissemination → advocacy → uptake tracking

The framework should also clarify who can speak on behalf of CCY, how advocacy positions are approved, and how sensitive findings are managed, including findings related to access, protection, accountability, remote monitoring and constrained operating environments.

5. Expected Deliverables

#	Deliverable	Expected content
1	Inception Report	Methodology, workplan, stakeholder consultation plan, analytical framework and document review plan.
2	CCY Evidence & Influence Landscape Assessment	Existing evidence, gaps, use of research, advocacy experience, external evidence landscape and strategic opportunities.
3	Stakeholder & Influence Map	Priority actors, decision-makers, influence pathways, engagement opportunities, risks and suggested messengers.
4	CCY Research & Learning Agenda 2026–2029	Prioritised research themes and questions, rationale, proposed methods, sequencing, potential partners and intended evidence-use objective.
5	CCY Advocacy & Influence Framework 2026–2029	Advocacy objectives, desired changes, audiences, key messages, messengers, channels and influence pathways.
6	Evidence-to-Action Framework	Process connecting programme evidence, research, decision-making, programme adaptation and advocacy.
7	Research Prioritisation Tool	Practical scoring tool allowing CCY to assess new research proposals, opportunities and donor requests.
8	Advocacy & Research Monitoring Framework	Indicators for evidence generation, uptake, programme adaptation, advocacy engagement and influence.
9	12–18 Month Action Plan	Prioritised research products, advocacy moments, responsibilities, indicative sequencing and resource requirements.
10	Final Integrated Strategy	Consolidated Research, Learning, Advocacy & Influence Strategy incorporating CCY feedback and validation.
11	Presentation and Validation Workshop	Presentation of key findings and facilitated validation session with CMU, CCY members and relevant Yemeni partners.

6. Methodology

The consultant should propose a participatory methodology. At minimum, the assignment should include:

Desk Review	• CCY Strategy 2026–2029 and results framework • Previous CCY research, assessments, evaluations and learning products • Relevant programme data and MEAL outputs • Market monitoring and accountability data, where appropriate • Previous CCY advocacy and donor engagement products • CMWG products and relevant Yemen cash evidence • Relevant global cash, localisation, resilience and social protection evidence
Internal Consultations	• CCY CMU • CCY Steering Committee • Technical focal points • Programme and field teams • Relevant country and HQ advocacy, policy, research and MEAL colleagues from consortium members
Yemeni Stakeholder Consultations	• National NGO partners • Yemeni technical and programme staff • Civil society actors • Academia and research institutions • Other relevant national actors and institutions
External Consultations	• Donors • CMWG stakeholders and other coordination actors • UN agencies • Humanitarian and development actors • Social protection stakeholders • Selected global cash actors

Validation

Facilitate a validation workshop to present proposed research priorities, advocacy objectives, influence pathways and governance arrangements for collective prioritisation and agreement before finalisation.

7. Key Questions the Consultancy Must Answer

1. What are the 5–8 most important evidence gaps CCY should address over the next 18 – 24 months?
2. Which questions require formal research, and which can be answered through better use of existing MEAL, market, accountability and operational data?
3. Where does CCY have a unique comparative advantage to generate evidence because of its scale, geographic coverage, harmonised systems or operational access?
4. What evidence is required to make better internal programme decisions?
5. What evidence is required to influence donors, coordination mechanisms, policy and practice?
6. What are the 3–5 changes in policy, funding, standards or practice that CCY should realistically seek to influence by 2029?
7. Who has the power to make those changes?
8. What evidence would be most relevant and persuasive to those audiences?
9. What role should the CMWG play as an influence pathway versus CCY advocating in its own institutional capacity?
10. How can CCY ensure Yemeni actors are not simply research respondents but increasingly co-producers and owners of evidence and advocacy?

11. How should sensitive evidence, particularly relating to access, protection, accountability, remote monitoring and constrained operating environments, be generated, validated and communicated?
12. How should CCY measure influence and evidence uptake rather than simply counting research reports and advocacy meetings?

8. Consultant / Consultancy Team Profile

The assignment should ideally be undertaken by a senior consultant or small team combining research and evidence expertise with humanitarian advocacy and cash programming knowledge.

Essential qualifications and experience

- Minimum 8–10 years of relevant experience in humanitarian research, evidence, policy and/or advocacy.
- Demonstrated experience developing organisational or consortium-level research and learning strategies.
- Strong experience developing advocacy and influencing strategies.
- Strong understanding of humanitarian cash and voucher assistance, preferably MPCA.
- Demonstrated ability to translate research into policy, programming or operational change.
- Experience working with humanitarian consortia or multi-agency platforms.
- Strong understanding of humanitarian coordination and donor decision-making.
- Experience working in complex and politically sensitive operating environments.
- Strong facilitation and stakeholder consultation skills.
- Excellent written and spoken English.

Highly desirable

- Experience working in Yemen or comparable contexts.
- Arabic language capability.
- Experience with localisation and locally led research.
- Experience with social protection and humanitarian-development linkages.
- Knowledge of global cash policy and coordination architecture.
- Experience with research uptake, knowledge translation or evidence-to-policy approaches.

9. Indicative Duration and Level of Effort

An indicative level of effort of approximately 30–35 working days over 8–10 weeks is recommended. A possible breakdown is:

- Inception and document review: approximately 4 days
- Evidence and influence landscape assessment: approximately 5 days
- Stakeholder consultations: approximately 8–10 days
- Analysis and framework development: approximately 6 days
- Validation: approximately 2 days
- Drafting, revision and finalisation: approximately 6–8 days

The consultant may propose adjustments to the sequencing and level of effort, provided the methodology allows sufficient consultation and validation and does not reduce the assignment to a desk-based strategy exercise.

10. Management of the Consultancy

The consultant will report to the CCY Chief of Party, with technical input from relevant CMU functions and designated representatives of CCY member organisations. A small Research and Advocacy Reference Group may be established for the consultancy, including CMU and selected consortium technical representatives, to provide technical feedback while

maintaining an efficient approval process. Final deliverables will be approved through CCY's established governance arrangements.

11. Recommended Strategic Framing

The final product should not be treated as a conventional "Research and Advocacy Strategy" consisting mainly of a list of studies and external messages. The CCY Strategy 2026–2029 is more ambitious: it requires CCY to build an evidence-to-action-to-influence system in which research and learning directly support programme decisions and external influence.

Research & Learning Agenda → Evidence-to-Action Framework → Advocacy & Influence Framework

This structure should ensure that SO4 does not become a standalone CMU workstream. Instead, research, learning and advocacy should directly support SO1 on MPCA, SO2 on resilience, protection and recovery, and SO3 on localisation and national systems. This is consistent with the Year 1 Roadmap, which calls for stronger integration between delivery, coordination, evidence, localisation and resilience so that they function as a mutually reinforcing system rather than parallel streams of activity.

12. Strategic Reference Points from the CCY Strategy 2026–2029

The consultancy should remain anchored in the following commitments from the finalized CCY Strategy:

- CCY will use evidence more systematically to inform programme design, improve effectiveness and strengthen advocacy and collective learning.
- CCY will develop a strategic and forward-looking research agenda aligned with consortium priorities and key operational and policy questions.
- Opportunity-driven and donor-responsive research should be incorporated without compromising strategic coherence.
- Operational evidence should be generated, consolidated and analysed across partners, while strengthening the analytical capacity of Yemeni staff and partner organisations and deepening collaboration with Yemeni research actors.
- Evidence should inform strategic direction, programme adaptation and operational improvements.
- Evidence and learning should be translated into advocacy, operational guidance and sector standards in Yemen and broader cash programming practice.
- Research and learning products should be systematically disseminated in Arabic and English.
- CCY should strengthen field-to-consortium feedback loops so that evidence informs both operational decision-making and external influence.
- By the end of Year 1, CCY should have an operational consortium-wide research and learning agenda and established processes to translate evidence into advocacy and policy engagement.
- The Results Framework should track not only research outputs but also use of evidence in programming and advocacy, programme changes informed by evidence, dissemination, advocacy engagements, contributions to coordination platforms, and evidence of influence on policy, standards, coordination practices and donor approaches.

13. Source

Primary source: Cash Consortium of Yemen (CCY), Strategy 2026–2029, Final Version. This Terms of Reference has been developed from the strategic direction, Strategic Objectives, Year 1 Roadmap, Theory of Change and Results Framework contained in the finalized strategy.