

## Document management processes and agreements

It is important to document decisions about the management of evaluative activities, including any processes for monitoring compliance with ethical and quality standards during the evaluation.

These documents will also ensure that different stakeholders, whether funders, partner organisations, communities or expert advisors are clear about what is being done, how and when, and their responsibilities and accountabilities for the evaluation.

Different organisations have different forms of documents and different labels for the document that describes what is to be done - the purpose, Key Evaluation Questions and timeline.

Sometimes this document is referred to as Terms of Reference (ToR), Scope of Work (SOW), Statement of Work (SOW), Request for Proposal (RFP), Request for Quotation (RFQ), Invitation To Tender (ITT) or the evaluation brief.

This document can be used for any type of evaluation (internal, external, self-evaluation) but they are particularly useful as part of the process of engaging an external evaluator.

Other types of documents might be developed to formalise the relationships between different organisations working together on the evaluation. These could include a Memorandum of Understanding or a Contractual Agreement.

## Methods

### Document what is needed in an evaluation

- [Expression of interest](#)

An expression of interest (EoI) is a way for an organisation to publish its intention to appoint an evaluation team to conduct an evaluation of a specific project or program.

- [Request for proposal \(RFP\)](#)

A Request for Proposal (RFP) is a formal request for evaluators to prepare a response to a planned evaluation and are generally used to select the final evaluator for the evaluation.

- [Scope of work](#)

A Scope of Work (SOW) is a plan for conducting an evaluation which outlines the work that is to be performed by the evaluation team.

- [Terms of reference](#)

A Terms of Reference (ToR) document provides an important overview of what is expected in an evaluation.

### Document how different organisations will work together

- [Contractual agreement](#)

A formal contract is needed to engage an external evaluator and a written agreement covering similar issues can also be used to document agreements about an internal evaluator.

- [Memorandum of understanding](#)

A Memorandum of Understanding (MOU) outlines an agreement between two collaborating bodies in order to identify the working relationships and guidelines that exist between them.