## Instructions

The GeneraTOR template organises the terms of reference into 16 sections.

The project information section is a good place to start. Follow the instructions in the section and write the relevant information in the ‘your answer here’ field.

Work your way through the sections. Complete only the sections that are relevant to your terms of reference.

Once you are finished, delete this page, all the instruction text (blue, italic text), and all the sections you did not require. You may wish to remove the section numbers as well.

## 1. Project information

### Title

Provide a short, descriptive title for the evaluation.

[your answer here]

### Project number

[your answer here]

## 2. Background information

### Background information

Write concise information about the pertinent project/program/issue to be investigated, the nature of the problem being pursued, historical, and environmental information as well as the organizational context in which the evaluation will occur.  
Situate the important stakeholders, including donors, partners, implementing agencies and organizations.

[your answer here]

## 3. Scope of the evaluation

### Scope of the evaluation

This refers to the boundaries, scale and/or limits of the evaluation.  
Write concise information (as relevant) about: the activities, or aspects of activities, that are to be evaluated; the time period covered; geographical focus; target groups.  
Also indicate items/issues that are outside of the scope of the evaluation (if any).

[your answer here]

## 4. Purpose / Objectives / Rationale

### Purpose / Objectives / Rationale

Provide a clear and succinct response to the question: Why are we doing this evaluation?

[your answer here]

## 5. Intended user(s) and use(s)

### Intended user(s) and use(s)

Specify the intended user(s) and use(s) of the evaluation. From beginning to end, the evaluation process is designed and carried out around the needs of the primary intended users. They have the responsibility to do things differently (e.g., make decisions, change strategies, take action, change policies, etc.) because of their engagement in the evaluation process or with the evaluation findings.  
Articulate the uses of both the evaluation findings and the processes:

* Using the findings of an evaluation can entail: making judgments of merit or worth; facilitating improvements, or generating knowledge.
* Process use(s) occur as a result of the learning that happens during the evaluation process. It is evidenced by changes in procedures and culture.

[your answer here]

## 6. Evaluation questions

The issue to be studied in the evaluation and the questions to be answered should be clearly detailed (e.g., what is it you want to find out through this evaluation?).

You cannot evaluate everything so you will need to make strategic choices about what warrants in-depth study. There are many interesting and important questions that could be asked, but they need to be prioritized based on the primary intended uses of the evaluation. The questions should be as specific as possible, because vague questions usually yield vague answers.

**More information**

An evaluation should be focused around answering a small number of high-level key evaluation questions (KEQs) which are about performance overall. Each of these key evaluation questions (KEQs) should be further unpacked by asking more detailed questions about performance on specific dimensions of merit (related to evaluative criteria such as relevance, equity, effectiveness, sustainability). The KEQs also need to reflect the intended uses of the evaluation.

Evaluation, by definition, must answer truly evaluative questions: it must ask not only ‘What were the results?’ (a descriptive question) but also ‘How good were the results?’ (an evaluative question). Depending on the type of evaluation, causal questions also need to be addressed (to what extent were the results due to the intervention rather than something else?).

Good KEQs are:

* limited in number: 7 ± 2 questions is a good number in general. This allows for coverage of different aspects of the intervention but is a small enough number of questions to not get overwhelmed.
* open questions (not yes/no answers).
* are specific enough to help focus the evaluation, but broad enough to be broken down further into more detailed questions to guide data collection.

Examples

* What was the quality of the intervention design/content?
* How well was the intervention implemented and adapted as needed?
* Did the intervention produce the intended results in the short, medium and long term? If so, for whom, to what extent and in what circumstances?
* What unintended results – positive and negative – did the intervention produce? How did these occur?
* What were the barriers and enablers that made the difference between successful and disappointing intervention implementation and results?
* How valuable were the results to service providers, clients, the community and/or organisations involved?
* To what extent did the intervention represent the best possible use of available resources to achieve results of the greatest possible value to participants and the community?
* Are any positive results likely to be sustained? In what circumstances?

[your answer here]

### Evaluation questions

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[your answer here]

## 7. The principles and approach that will guide the evaluation

### The principles and approach that will guide the evaluation

The principles and approach that will guide the evaluation (e.g., transparency, partnership, openness, cost-effectiveness, etc.), should be articulated.

Given the nature of international development, addressing gender awareness and cultural sensitivity should be incorporated into this section.

Also include a statement on the need for the evaluator to follow appropriate ethical procedures.

[your answer here]

## 8. Methodology

Once the overall evaluation design has been selected, the methods of investigation should be articulated and should be consistent with answering the evaluation questions, the intended users/uses, the principles and approaches as well as the budget and timeline for the evaluation.

The methodology section should specify as much detail as possible on information sources / data collection instruments, protocols and procedures.

### Information sources / data collection instruments, protocols and procedures

#### Retrieving existing documents and data

For example:

* Formal policy documents, implementation plans and reports
* Program monitoring data
* Official statistics
* Program records
* Other…

[your answer here]

#### Collecting data from individuals or groups

For example:

* Interviews *(specify, e.g. key informant, individual, group, focus group discussions, projective techniques)*
* Questionnaire or survey *(specify e.g. email, web, face to face, mobile data)*
* Specialized methods *(specify e.g. dotmocracy, hierarchical card sorting, seasonal calendars, projective techniques, stories, photovoice)*

[your answer here]

#### Observation

For example:

* Structured or non-structured
* Participant or non-participant
* Participatory or non-participatory
* Recorded

[your answer here]

#### Physical Measurements

For example:

* Biophysical measurements
* Geographical information

[your answer here]

### Sampling Procedures

[your answer here]

### Provisions to obtain needed permissions to collect and report data

[your answer here]

### Provisions to store and maintain security of collected information

[your answer here]

### Procedures for analyzing quantitative and qualitative data

[your answer here]

### Protocols for anonymity/confidentiality

[your answer here]

### Inclusion or not of response from those being evaluate

[your answer here]

### Data presentation and dissemination methods

[your answer here]

## 9. Roles and responsibilities

### Roles and responsibilities

By clearly delineating roles and responsibilities of all those involved in the evaluation process, you are more likely to avoid substantive, administration and communication problems.

Consider the following and outline clearly who will do what:

* Who will collect and analyse data?
* Who will facilitate use?
* Who will present/disseminate findings?
* Who will write the report?
* Who will participate in what meetings/workshops?
* Who will make logistical arrangements?
* Who will provide information and access to documents?
* Who will manage the contract/evaluation process and serve as a liaison with the evaluator/evaluation team?
* Who will approve the final products?
* Who will arrange and participate in travel?

[your answer here]

## 10. Evaluator qualifications

### Evaluator qualifications

Describe the composition and responsibilities of the evaluator or evaluation team leader and each team member. Distinguish between desired and mandatory competencies, as well as whether competencies are required by the whole team of by selected team members.

Multidisciplinary teams are often appropriate – the qualification and skill areas to be specified could include: areas of technical competence, language proficiency, in-country or regional work experience, process management skills such as facilitation skills, appropriate mix of male and female evaluators.

[your answer here]

## 11. Reporting requirements

### Reporting requirements

The reporting requirements should spell out the desired:

* Format (oral, written, video, etc)
* Dissemination materials (summary, briefs, presentation materials, newsletter article, etc.)
* Intended audience(s)
* Content
* Length
* Decision on whether the evaluation report should/should not include recommendations
* Decision on whether you want the completed data sets returned (filled out questionnaires, surveys, interview notes and tapes, etc.)
* Method of delivery (All reports should be electronically delivered to IDRC in addition to any other form of delivery)
* Restriction/permission to publish information from or based on the evaluation

[your answer here]

## 12. Estimation of the cost

### Estimation of the cost

An accurate and detailed estimation of the cost of the evaluation for the Fees or Expenses portion of the contract should be presented.

An evaluation budget should include the costs of:

* Personnel (e.g. evaluator(s), research assistant, support staff, etc.) per day or lump sum
* Travel (transportation, per diem, travel mobilization expenses, consider class of travel)
* Supplies, equipment and Direct communication costs such as phone, fax, email, postage
* Translation
* Copying and printing
* Workshops (design, findings verification, utilization, etc.)
* Facilitation of use by intended user

[your answer here]

If there is an estimated costs or costing template, add this at the end of this document

## 13. Procedures and logistics

### Procedures and logistics

As relevant, specify the support that will be provided or any special requirements/considerations:

* Special procedures, e.g., relations with press or security
* Work hours, holidays and requirements
* Weather, travel and socio-cultural conditions that may influence data collection
* Availability and provision of services (local translators, interviewers, etc)
* Availability and provision of office space, cars, laptops, etc

[your answer here]

## 14. Timeline and milestones

### Timeline and milestones

Detail the timeline and milestones that will need to be achieved. You can break the phases into:

* Planning
* Data collection / collation
* Data analysis
* Reporting
* Facilitation of use
* Payment schedule for fees/expenses if applicable

[your answer here]

If there is a required timeline template, add this at the end of this document

## 15. Quality assessment of the evaluation report

### Quality assessment of the evaluation report

Indicate that the quality of the evaluation report the evaluator(s) produce will be assessed.

[your answer here]

## 16. Annexes

### Annexes

Indicate which information will need to be provided in an annex, such as: details of any monitoring and evaluation frameworks that have direct relevance to the study; terms of reference for any management or reference groups overseeing the study; editorial requirements for consultants preparing evaluation reports; evaluation guidance notes such as on ethics, etc

[your answer here]