

SESSION 11

Terms of Reference for an Evaluation

The evaluation team profile

Key points to remember for evaluation ToR

Terms of Reference for an Evaluation: Session Outline

- *Plenary debriefing of the exercise*
- *Evaluation team profile*
- *Key points to remember for ToR drafting*



Insert requirements for the evaluation team

Insist on sound level of **knowledge** and **experience** in:

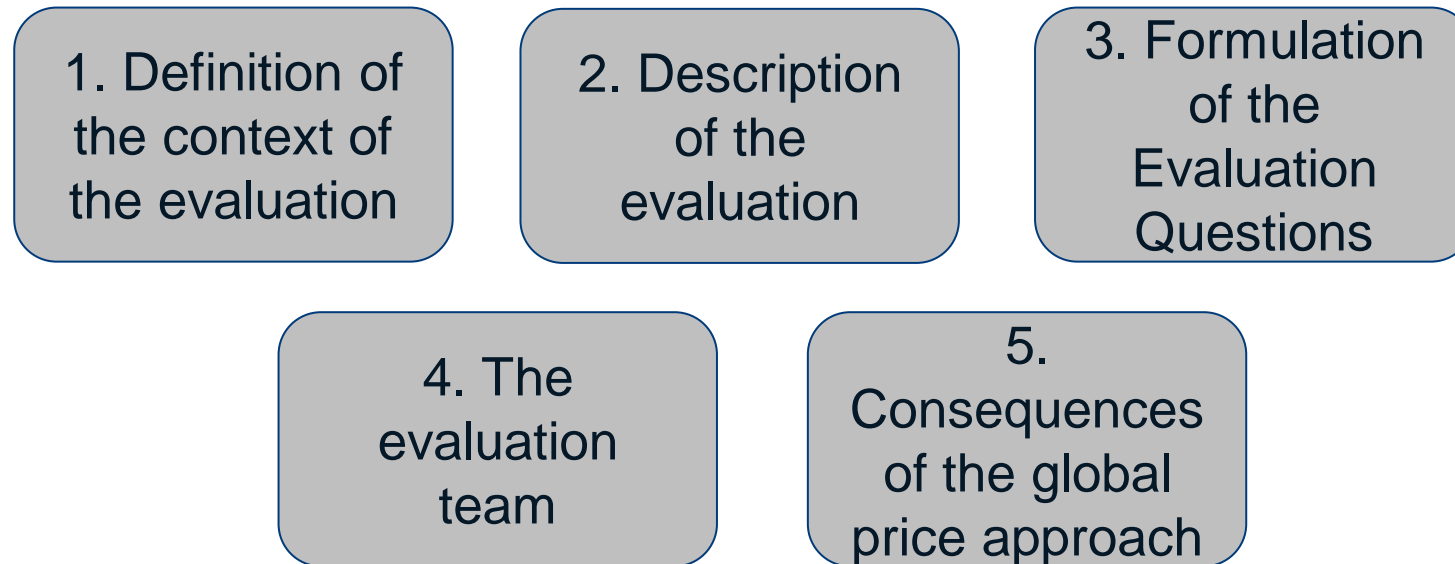
- **evaluation methods and techniques** in general and, if possible, of evaluation in the field of development and cooperation (or in specific techniques)
- the **country** and/or the **region**
- **particular fields** to be specified (focal sectors)
- If possible, request the inclusion of **local consultants**
(without explicitly mentioning their origin)

Define expert skills and profile needed

- Leave a degree of **flexibility** when defining the expert profiles
 - ✓ Avoid “**essential**” unless really the case
 - ✓ Very **demanding profiles** and qualifications are often **counter-productive**
- two **strategies** exist:
 - ✓ **expert by expert** description
 - ✓ **Description of a team** whose **members possess & cover** several **skills, knowledge and fields**
- **BUT Description by team is the preferred one** (imposed by SEIA procedures)



Evaluation team profile is one of the recurrent weaknesses in ToR



Let's look at 4 ...

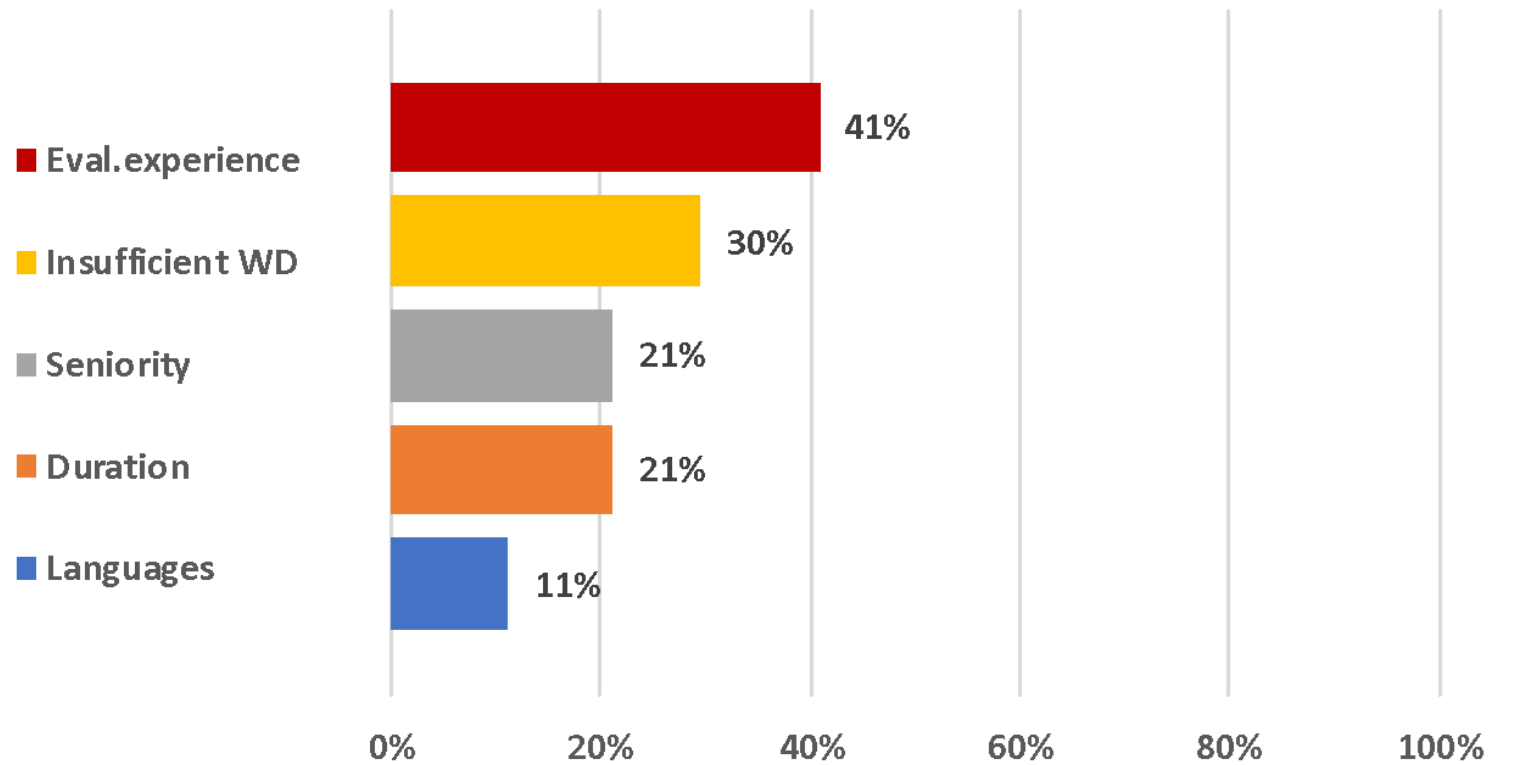
Page 19 of 36

The indication of a minimum number of working days for the Team Leader is also suggested

The evaluation team

*This is about
chapter 3 of the
ToR template*

Errors related to the evaluation team



Hints and tips: 1

The evaluation team

Many ToR still prioritise sector-expertise over professional evaluation skills and experience. The non inclusion in lead roles of professional evaluators in your evaluation team is a recipe for failure.

Preparing an evaluation ToR?
Request professional evaluators, at least in lead roles.

Most frequent consequences of hiring non professional evaluators

- Evaluation questions not based on the Intervention Logic (missing key elements of analysis)
- Non-specific methodology, not context-specific
- Bias in the selection of interviewees
- Insufficient number of informants / interviewees
- Errors in the use of evaluation tools
- No / insufficient data collection
- Errors in analyzing data
- Use of wrong indicators / no indicators
- Absence of genuine reflection (reporting opinions, not conclusions)
- The consultants reports positions of different stakeholders but do not conclude
- Conclusions not grounded on a solid evidence base
- Generic / not 'usable' recommendations OR recommendations not grounded on solid conclusions



In short...



Bread is made by bakers



**Evaluations are done by
evaluators**

Hints and tips: 2

The evaluation team

Prioritise inter-disciplinary evaluation teams, including both professional evaluation experience and subject-matter expertise.

Assign team leadership to a professional evaluator with sufficient seniority.

For simple evaluations assigned to a single consultant, hire a professional evaluator with previous evaluation experience in the relevant sector.

Hints and tips: 3

The evaluation
team

30% of the ToR received by the ESS helpdesk underestimate the effort needed to do a quality evaluation.
This is another recipe for failure.

Be ambitious in your evaluation mandate but be fair: assign to evaluators the time they need to do a quality job.

	Cat I days	Cat II days	Cat III days	Comments
Initial desk study				Min. 3 dd for the TL
Kick-off				Min. 1 dd for each participant expert
Initial interviews				Consider max 4 interviews per expert/day
Further desk study				Depending on the number and size of secondary sources
Reconstr. LogFrame				Min. 2 dd for the TL, other experts need to be involved
Methodology				Min. 2 dd for the TL, other experts may need to be involved
Evaluation Matrix				Min. 2 dd for the TL, other experts need to be involved
Finalisation of the EQ				Min. 1 dd for the TL, other experts need to be involved
Development tools				Min. 2 dd for the TL, but they can be many more
Writing Inception Report				Min. 3 dd for the TL, other experts need to be involved
Finalising IR after comments				Min. 2 dd for the TL, other experts may need to be involved
Desk phase				If needed, its length depends on # and size of secondary sources
Interim report				If needed, Min. 3 dd for the TL plus involvement of further experts
Schedul. interviews				Depending on # interviewees and travels it could absorb up to 4 dd
Field missions				Consider each location separately and add as many rows as needed; include travel time, as well for remote locations
Field debrief				Min. 1 dd for each participant to the field
Wrap-up				Min. 4 dd for the TL+ plus a few days from each member
Final reporting				Min. 7 dd for the TL plus substantial dd from the other members
Finalising FR after comments				Min. 3 dd for the TL, other experts may need to be involved

Hints and tips: 4

The evaluation team

Framework Contractors usually rely on a large pool of consultants; however, finding the appropriate evaluators for some particularly demanding evaluations can be difficult.

14 calendar days is the minimum period foreseen by the Global ToR SIEA; in case of demanding evaluations assign them 1-2 additional weeks to respond.



© European Union 2020

Unless otherwise noted the reuse of this presentation is authorised under the [CC BY 4.0](https://creativecommons.org/licenses/by/4.0/) license. For any use or reproduction of elements that are not owned by the EU, permission may need to be sought directly from the respective right holders.

