

## SESSION 9

### Terms of Reference for an Evaluation:

- ✓ Key features of the new template
- ✓ Structure & content
- ✓ Evaluation team

# Terms of Reference: a new template!

- *What has changed?*
- *Where to put your effort?*



Let's explore the standard ToR [template](#)



European  
Commission

# Structure of new template: Version 2.0

Introduction	
Checklist	
<b>Part A:</b> <b>7 Chapters</b> <b>7 Annexes</b>	<b>Part A:</b> <b>guidance boxes,</b> <b>yellow texts</b> <b>(chapters and</b> <b>annexes)</b>
<b>Part B: guidance to online filling</b>	

**Broad consultation process**

**Simplified**

**Improved guidance**

**Part A:** Guidance Notes and the ToR template (including annexes); once completed and after deletion of guidance it can be uploaded into OPSYS.

**Part B:** contains guidance to develop online Part B of the ToR in OPSYS -not to be uploaded in OPSYS.

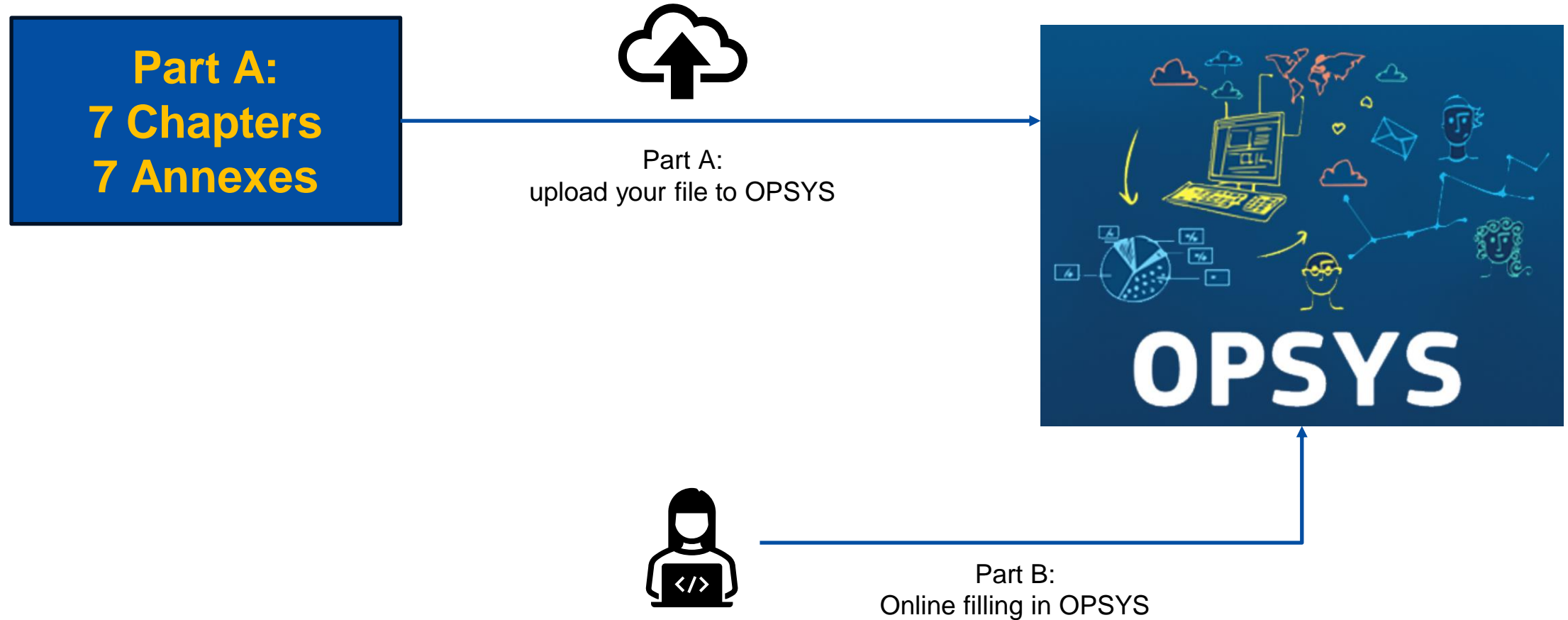
# Once your ToR are ready...

**Part A:  
7 Chapters  
7 Annexes**

**Everything in yellow is guidance  
and can be deleted before  
uploading**



# Finalise your ToR in OPSYS...



# Analysis of key parts: chapters Part A

## **Part A: 7 Chapters**

**1 - Background**  
**2 – Descr.evaluation  
assignment**

**99% of your ToR drafting  
efforts go here...**

**3 – Logistics and  
timing**  
**4 – Requirements**  
**5 – Reports**  
**6 – Monitoring and  
evaluation**  
**7 – Practical  
information**

**Standard text, cross-references to  
Part B etc.**

# Analysis of key parts: annexes

## **Part A: 7 Annexes**

**I – LogFrame(s)**

**II – The evaluation criteria**

**III – Information that will be provided to the team**

**IV – The evaluation matrix**

**V – Structure of the reports**

**VI – Planning schedule**

**VII – EVAL QAG**

# Analysis of key parts: chapters Part A

## Part A: 7 Chapters

### 1 - Background

Very few changes, same rationale as in previous versions:

1.1, Relevant country background, at the time of the intervention design and its evolution. Do not include here the description of the intervention to be evaluated.

1.2, The intervention(s) to be evaluated. Describe here the intervention and its Theory of Change / IL.

1.3, Stakeholders of the intervention. Now in a handy table format to help presenting their interactions with the intervention.

1.4, Previous monitoring and evaluations. A space for summarising results of previous assessment(s) of the intervention, if any.

Clearer guidance throughout the chapter, some reformulations.





# Analysis of key parts: chapters Part A

## Part A: 7 Chapters

### 2 – Description of evaluation

Several simplifications:

2.1. Objectives of the evaluation and evaluation criteria. One single chapter, text simplified, optional text suggested to justify the non use of some criteria.

2.2 Indicative Evaluation Questions. Difference between EQs and Issues to be studies eliminated. EQs can be organised by any meaningful criteria: by evaluation criteria, by transversal areas, by thematic areas.

2.3 Structuring of the evaluation and outputs. It provides a clear and standardised description of the evaluation phases and activities. Flexibility of the evaluation structuring enhanced, clearer texts, additional guidance.



# Analysis of key parts: structuring of evaluation

**Part A:  
7 Chapters**

## **2 – Descr.evaluation assignment**

2.3, Structuring of the  
evaluation and outputs



**Desk and Field merged**

Inception phase

Interim phase

- *Desk and field activities*

Synthesis phase

Dissemination phase

Delete chapter 2.3.2.1  
(Desk activities) and  
chapter 2.3.2.2 (Field  
activities)

Delete Annex V  
(Structure of the  
reports), chapter 2  
(Desk report) and  
chapter 3 (Intermediary  
field note)

# Analysis of key parts: chapters Part A

## Part A: 7 Chapters

### 2 – Descr. Evaluation assignment

2.3.5, Overview of the outputs and meetings and their timing. One single table, eliminating repetitions. To be adapted to reflect the structuring of your evaluation.

2.4, Specific Organisation and Methodology. Additional text suggested in case of difficulties to access the field.

2.4.1, Evaluation ethics. A reminder of the evaluators' ethical obligations.

2.5, Management and steering of the evaluation at the EU and at the Contractor level – no changes.

2.6, Language of the specific contract and of the reports – no changes

Clearer guidance throughout the chapter, some reformulations.



# Terms of Reference: key content

- *Background information*
- *Evaluation objectives and scope*
- *Indicative evaluation questions*
- *Methodology and approach*
- *Reporting requirements*
- *Workplan and timetable*



Let's explore the standard ToR [template](#)



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# Provide basic information describing the intervention

- **Identification**

- ✓ Full **name** of the project/programme
- ✓ **Legal basis** and **commitment/decision** underpinning EC support

- **Strategic components**

- ✓ Overall **objectives, purpose, outputs** for the targeted groups/areas and activities (refer to the logical framework to be appended); any **significant change to the original objective**
- ✓ **Origin** of the project/programme, historical **background, design** and programming **process**, policies and strategies to which the project/programme contributes
- ✓ **Evolution of the context – major trends** – in the political, institutional, social and/or economic fields

These may be available in project documentation  
**Copy, Paste BUT Revise and Update**

## Navigation

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### Headings

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#### 1 BACKGROUND

1.1 Relevant country [region / sect...

1.2 The intervention[s] to be evalu...

1.3 Stakeholders of the intervention

1.4 Previous internal and external...

#### 2 DESCRIPTION OF THE EVALUATIO...

2.1 Objectives of the evaluation a...

2.2 Indicative Evaluation Questions

#### 2.3 Structuring of the evaluation a...

2.3.1 Inception Phase

2.3.2 Interim Phase

2.3.3 Synthesis Phase

2.3.4 Dissemination Phase

2.3.5 Overview of the outputs...

#### 2.4 Specific contract Organisation...

2.4.1 Evaluation ethics

#### 2.5 Management and steering of t...

#### 1 BACKGROUND

The objective of this chapter is to provide a summarised, **descriptive overview of the intervention(s) to be evaluated (not of the evaluation assignment, which is to be described in Chapter 2).** It aims to provide the key information required for framework contractors to contextualise the intervention to be evaluated.

The chapter should be **factual and not contain judgement on the results or the performance** of the intervention to be evaluated so as not to influence the independent work of the evaluators.

No text is to be included between the Heading of the chapter 1 (Background) and the Heading of the chapter 1.1 (Relevant country/region/sector background), **unless you wish to include a preamble.**

The suggested headings (and their titles) are meant to provide guidance for the writing of the chapter but **can be modified as needed.** It is, however, important that all the **elements suggested by the sub-headings are addressed.**

##### 1.1 Relevant country [region / sector] background

Feel free to adapt the title to reflect your specific evaluation, and to use sub-chapters if you prefer.

The objective of this chapter is to provide framework contractors with:

- a **snapshot of notable and relevant elements** of the country/region/sector background **at the time the intervention to be evaluated was designed**, including a reference to the National Development Plan of the Country.
- a short description of the **evolution of the background** during the period under evaluation.

Develop your text here

##### 1.2 The intervention[s] to be evaluated<sup>4</sup>

The following table may require adaptation in case of complex evaluations, such as thematic evaluations at regional or country level.

If your evaluation covers more than one intervention, use bullet lists to indicate the required information for each of these interventions. If you prefer, include one different table for each intervention to be evaluated.

Please consult the relevant support services in your DG/service in case of doubt.

This evaluation covers [indicate number] interventions financed by the EU in the [indicate sector(s) as relevant] sector as follows:

Title[s] of the intervention[s] to be evaluated	

# Provide basic information describing the intervention

- **Operational components**

- ✓ **Components** and **key implementation arrangements**  
(management, contracts, monitoring, co-ordination, partnerships).
- ✓ **Cost, funding** modalities, co-financing, significant **changes**, if any.
- ✓ **Duration** and **schedule**, significant **changes**, if any.
- ✓ **State of implementation**, indicating any noticeable successes or problems.

# Define the evaluation objectives & scope

## Objective & Scope

**WHY ?**

Main **objectives** and **purpose**  
*(management, lessons learned, accountability)*

**FOR WHOM ?**

**Use and users** of the evaluation

**WHICH PERIOD?**

**Temporal limits**

**WHAT SCALE?**

**Geographic legal and administrative dimensions**

**WHAT FOCUS?**

**Sector or theme** or component to be evaluated  
(or issues to be studied)

**Key part of the ToR**



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#### 2 DESCRIPTION OF THE EVALUATIO...

- 2.1 Objectives of the evaluation a...
- 2.2 Indicative Evaluation Questions

#### 2.3 Structuring of the evaluation a...

- 2.3.1 Inception Phase
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- 2.3.4 Dissemination Phase
- 2.3.5 Overview of the outputs...

#### 2.4 Specific contract Organisation...

- 2.4.1 Evaluation ethics

#### 2.5 Management and steering of t...

#### 2.1 Objectives of the evaluation and evaluation criteria

Systematic and timely evaluation of its programmes and activities is an established priority<sup>7</sup> of the European Commission<sup>8</sup>. The focus of evaluations is on the assessment of achievements, the **quality** and the **results**<sup>9</sup> of interventions in the context of an evolving cooperation policy, with an increasing emphasis on **result-oriented approaches and the contribution towards the implementation of the SDGs**.<sup>10</sup>

From this perspective, evaluations should **look for evidence of why, whether and how the EU intervention(s) has/have contributed to the achievement of these results** and seek to **identify the factors driving or hindering progress**.

The main objectives of this evaluation are to provide the relevant services of the European Union, the interested stakeholders and the wider public **[delete 'the wider public' if not relevant and/or complete by other audience]** with:

- an overall independent assessment of the performance of the **[name of the intervention(s) to be evaluated]**, paying particular attention to its different levels of results measured against its expected objectives; and the reasons underpinning such **results**;
- key lessons learned, conclusions and related recommendations **in order to improve current [if relevant]** and future interventions.

*The above text does not require changes – just complete the parts in yellow.*

In particular, this evaluation will serve [.....]

*Please describe **in a few words** why your specific evaluation is needed.*

*By doing so **focus on the top priorities of your evaluation** (what use will you make of the **results** of this evaluation?). These can be **2-3 maximum**.*

*Examples (feel free to modify and adapt to your case, being as specific as possible):*

- to understand the performance of the intervention and the reasons behind it in order to maximise its potential to achieve the expected results during the residual implementation **time**;
- to understand whether the implementation modalities of the intervention are the most appropriate in order to achieve its **objectives**;
- to understand whether the governance mechanism of the intervention allows for a suitable and efficient representation of the interests of key stakeholders;

# Formulate the evaluation questions

- Use or identify **key issues** to focus evaluation
- Refer to evaluation **criteria** with respect to the phase of the intervention cycle (*ex ante* – *in itinere* – *ex post*)
- Formulate **clear and precise** evaluation questions that are **linkable to causal chains** in the IL



A synthesis of all answers to evaluation questions should **allow an overall assessment of the project/programme**

EQs can be organised according to **alternative criteria**:

- by the **selected evaluation criteria** (6 DAC + the EU Added Value)
- by **clusters** covering **transversal areas** most relevant to evaluation e.g., i) policy framework and responsiveness, ii) management and governance (institutional set-up)..- by **thematic areas**.



# Structuring of the evaluation and outputs

- Describes the **main methodological stages, activities** and **products/outputs** of each stage of the evaluation process
- **Specify** the methodological **approach** if required
- Define **particular tools** to be used
- Define, if possible, the terms of **interaction** with the evaluators (seminar/workshop)
- **Adapt methodology & approach to the type of intervention** (*flexibility and recognition of the evaluators' expertise for project evaluation vs. standard and exhaustive sequence for strategic evaluation*)



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Annex I: logical framework matrix (Lo...

Annex II: THE EVALUATION CRITERIA

Annex III: Information that will be pr...

Annex IV: THE EVALUATION matrix

Annex V: Structure of the reports

Annex VI: Planning schedule

Annex VII: EVAL Quality Assessment...

## REQUIREMENTS

### 6. Expertise

Option to be selected: "Expertise composition" of the RfS = "Request on expertise by a team".

- As described in the Global ToR SIEA, Article 6.2.3, 'The precise time inputs of the experts under a global price contract will be left to the discretion of the framework contractor to propose in the specific offer. However, the specific Contracting Authority may, where appropriate, decide to indicate an absolute minimum input in terms of working days and/or qualifications for one or more experts.'
- The expertise required **must include** professional evaluation skills (particularly for the Team Leader) and other expertise as needed, such as sector-specific expertise, team management skills, gender expertise, communication and language skills.
- While professional evaluators can have difficulties in conducting evaluations requiring specific thematic expertise on their own, the **setting up of mixed teams including professional evaluation expertise and relevant thematic expertise is in many cases an ideal configuration**. In these cases, the leadership is given to a professional evaluator of suitable seniority.
- Please **remember**: identification, monitoring, evaluation, audit and management are not synonyms and the experience acquired in each of these domains is not interchangeable. A good monitor is not necessarily a good evaluator. Therefore, do not use formulas such as 'the team will have a cumulative experience of xx years in identification, management, monitoring, evaluation or audit of cooperation development projects.'

[If the "Expertise composition" of the RfS = "Request on expertise by a team"]

The minimum requirements covered by the team of experts as a whole are detailed below.

- Qualifications and skills required for the team:

[Qualifications and skills required]

- When defining the requirements, equal access must be **guaranteed** and the profiles should not create unjustified obstacles to competitive tendering. Furthermore, the profiles should be clear and non-discriminatory. For example, "local expertise" or "locally-available expertise" may be required but not a "local expert" (i.e. a national/resident of a country).
- Due consideration should be taken to the real minimum requirements and the existence of such experts on the market when choosing the criteria. The criteria should be as broad as possible. Quantifiable criteria should be drafted with vigilance.
- Please specify carefully what minimum and what preferred requirements are. It should be borne in mind that, if the proposed team of experts does not meet the minimum requirements, the entire offer is rejected.

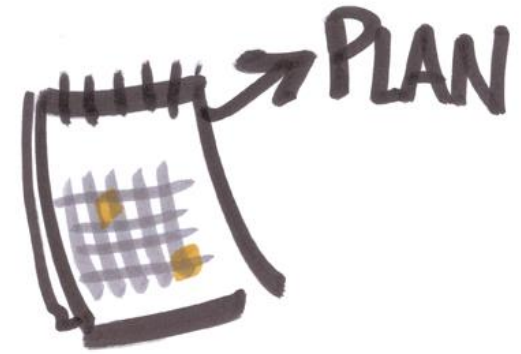
# Describe in detail reporting requirements



And don't forget to describe milestone deliverables and dissemination products !

# Draw up the workplan & timetable

- Do a **retro-planning** of activities
  - ✓ Define when you need the report -> Plan backwards
- Foresee **realistic time for feedback** from EUD and RG
  - ✓ **Use relative timing instead of fixed dates** e.g  
Feedback on draft report: Delivery date + 10 days,  
instead of 28/7
- Include **time buffer for unforeseen events**, especially  
in the field activities





# Example of workplan & timetable

<i>Evaluation process</i>	<i>Notes and reports</i>	<i>Dates</i>	<i>Meetings</i>
<b>Desk phase</b>			
Inception	submission inception note/report		Reference group meeting
Finalisation	submission desk report		Reference group meeting Interviews with programme management, EC services, etc.
<b>Field phase</b>			
Travel Information collection in country (De)briefing in country (De)briefing EC HQ	Seminar material		Seminar (if appropriate) Reference Group meeting
<b>Synthesis phase</b>			
Finalization of evaluation report	Drafting provisional final report		Reference group meeting
Final restitution (if appropriate)	Seminar material		Seminar (if appropriate)
	Final report		Presentation to final beneficiaries



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5 REPORTS

Keep the text following this guidance box as it is and refer to the guidance for the Part B.

<sup>17</sup> As per Article 16.4 a) of the General Conditions of the Framework Contract SIEA

INTPA-NEAR-FPI SIEA/OPSY evaluation TOR – v.2.0

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For the list of reports, please refer to Chapter 2.3 of Part A and to Part B of the Terms of Reference.

**5.1 Use of the EVAL module by the evaluators**

The selected contractor will **submit all deliverables by uploading them into the EVAL Module**, an evaluation process management tool and repository of the European Commission. The selected contractor will receive access to online and offline guidance in order to operate with the module during the related specific contract validity.

**5.2 Number of report copies**

The Maximum number of paper copies of the Final Report is set at 10 by the Global Terms of Reference (Article 7.2). You can decrease this number in case you need a lower number of printed copies. Copies above 10 must be budgeted by the framework contractor in the Financial Offer. Do not forget to specify this in case you need a higher number of paper copies.

Apart from its submission, the approved version of the Final Report will be also provided in [number – max 10] paper copies [if necessary] and in electronic version [specify in which format if you have preferences and on which type of support] at no extra cost.

**5.3 Formatting of reports**

All reports will be produced using Font Arial or Times New Roman minimum letter size 11 and 12 respectively, single spacing, double sided. [Add any other specific requirement regarding formatting and layout you may have]. They will be sent in Word and PDF formats.

# Terms of Reference for an Evaluation: Session Outline

- *Evaluation team profile*



# 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 expertise** (not necessarily “local expert”)

# 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**
  - ✓ Define requirements in terms of **general professional experience** e.g. “The evaluation team must have a cumulative experience of at least XX years in the area of evaluation...”
  - ✓ To define requirements in terms of specific professional experience e.g., “**At least one of the experts must have** a minimum of XX successfully completed intervention-level or strategic evaluations. Experience in the evaluation of [indicate the **sector of your evaluation**] will be considered an asset.”



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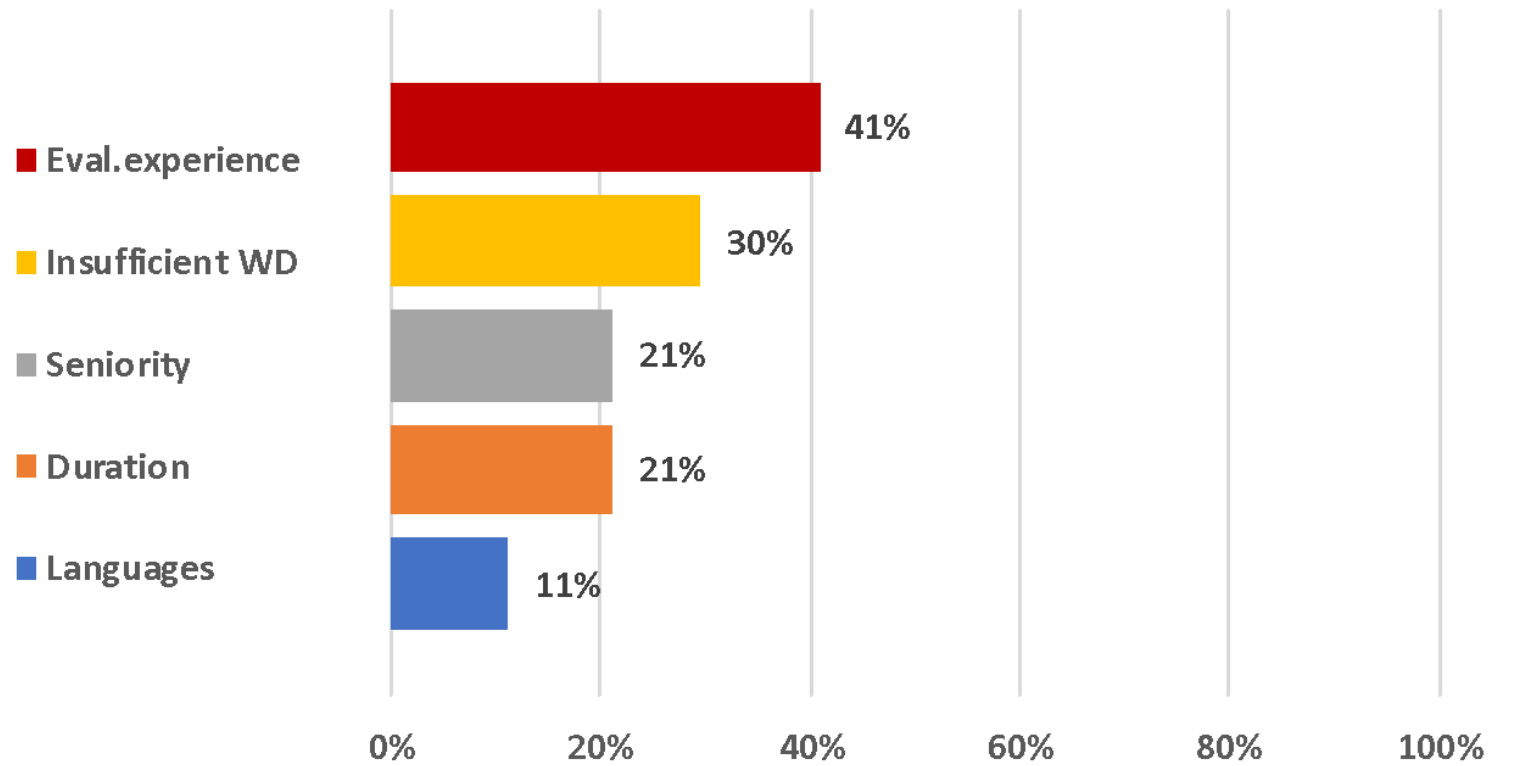
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Evaluation Template SIEA/DPSYS v.2.0

## The evaluation team

*This is about  
chapter 6 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.



# Offline exercise

**Podcast listening - Explore  
adaptive evaluation  
approaches**

# Exercise - Adaptive evaluation approaches

It's time to explore the famous ESS podcasts from the series EvalInCrisis!

Take a good cup of tea, put your headset on, and go take some fresh air while listening to a fascinating evaluation adaptation in time of crisis (and pandemic, of course!).

Ready? Go!

1. Follow this link to ESS webpage on Capacity4dev <https://europa.eu/capacity4dev/pafiriz/devco-ess/wiki/podcasts-evaluation-crisis>
2. Have a look at the podcast available and pick one (just 1 !) that is attracting to you
3. Listen attentively (about 15') to the podcast and note down the ideas that stroked you most during this podcast.
4. Go to <http://www.menti.com> type the code you received and share with us what was interesting





# Offline exercise

**Video watching – INTPA  
lessons learned on ToR  
drafting**



# Exercise - INTPA lessons learned on ToR

Here are your instructions for this self-paced exercise.

Take a good coffee, make you at ease, and let's go !

1. Open on the mentimeter questionnaire (and keep it open throughout the exercise!) using the code received
2. Open on the videolink received on common mistakes in evaluation ToR
3. Listen only to the extracts as per the timing indicated in the email you received
4. While listening, tick answers at your pace to the few anonymous questions you will find on mentimeter using the code you received



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