**Terms OF REFERENCE FOR EXTERNAL EVALUATION**

**INDICATIVE content**

# Presentation of Terre des Hommes

In general and in the countries concerned. Outline of the Tdh foundation’s work.

*Describe its history, strategy, activities by sector, project localization; give a description of the relevant project, the beneficiaries, etc. (2 to 3 paragraphs)*

# Context

Describe the characteristics of the area of intervention in relation to the key themes of the project / programme.

Describe the project to be evaluated

* *Title*
* *Start and End date - duration*
* *Total budget*
* *General and specific objective*
* *Theory of change if applicable*
* *Expected results / indicators and activities*
* *Project stakeholders*
* *Groups targeted by the project*
* *Brief summary of the project’s monitoring system*

# Objective of the evaluation

**Specify**

* *Why should this project be evaluated? Why now?*

*In general, the objectives of an evaluation are:*

* *Accountability (towards the funders, partners and the beneficiaries)*
* *Learning*
* *To respond to operational concerns (what consequences will the action have), and strategic concerns (what lessons can be drawn to improve the intervention strategies of the institutions concerned)?*

# Scope of the evaluation

*Evaluations can deal with a project, an institution, a programme, a system, a policy issue, etc. The scope of the evaluation can be very circumscribed (PSS intervention in a project) or quite wide (a four-phase programme).*

*Specify here which geographic field, which sector, on which phase of the project / programme the evaluation will focus? Should the evaluation be focused on the level of political or institutional change, or direct aid? Should it concentrate on cross-cutting issues? What are the potential limits of the evaluation?*

# Intended users of the evaluation

* *Who are the main audience of this evaluation?*
* *How will the evaluation results be used and by whom ? What will this evaluation bring to the team?*

# Evaluation criteria and questions

**List the main questions** to which you want the evaluator to respond in accordance with the aim of the evaluation. The goal here is to guide the evaluator in his approach so as to specifically reply to the questions you feel have priority. If these questions are numerous, try to group and prioritize them. If you ask too many, they will not be answered.

With regard to these questions: specify clearly the **criteria of evaluation** you wish the evaluator to use. You may use the DAC criteria only (relevance, effectiveness, efficiency, impact (negative or positive), sustainability, etc.) and add – if wished – other criteria sometimes used in evaluations (coverage, coordination, coherence, protection, flexibility, do no harm).

**Caution:**

* Do not multiply the evaluation questions so as not to run the risk of diffusion and superficiality in the analysis. The general recommendation is to limit oneself to 10 questions. Focus on key questions and topics.
* Do not multiply the criteria of evaluation (this depends on the time allocated to the evaluation, your objectives and the nature of the project). The criteria of impact and efficiency are often hard to assess. Calculating efficiency requires its own methodology with comparison of models and approaches.

**Tip:**

* Start by formulating your evaluation questions and then group them by criteria, do not set out with criteria to formulate your questions.
* Avoid overarching questions such as “have we got the right strategy” ?🡪 unpack them

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| *Example of questions (here general)*   * **Relevance** * *To what extent has the project adequately targeted the real needs of the population?* * *Do certain priorities still persist despite the implementation of the programme?* * **Effectiveness** * *To what extent have the objectives set and the results expected been met ?* * **Coverage** * *To what extent has the project effectively benefited the most vulnerable people?* * **Efficiency** * *Have all the resources been utilized in the best way?* |

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| **C:\Users\smr\AppData\Local\Temp\7zOC9C31E45\picto_loupe_orange-01.png** | *Evaluation questions can be of different nature : descriptive, normative, causal, action-oriented. For more information, consult ALNAP guide page 103 – 112* [*http://www.alnap.org/resource/23592*](http://www.alnap.org/resource/23592) |

# Methodology

*In general, the consultant should be allowed freedom to define his methodology in dialogue with the team that accompanies the evaluation. You can, in this section, give some indications to:*

* *Communicate and present any information available on and what type (with estimated number) of (categories of) resource persons to be included in the collection of data;*
* *Underline the participatory character of the evaluation or the kind of approach you would like to recommend*
* *Possibly suggest methods adapted to the evaluation questions, formulate expectations in keeping with the means provided.*

# Deliverables

*Describe the products that the consultant is obliged to submit.*

***At least***

* *An initial (Inception) report (specify the language) including: revision of the methodology, evaluation matrix (see tool), schedule and revised working plan, initial documentary analysis;*
* *A de-briefing and presentation of findings to the team in the field;*
* *A preliminary report to be provided* ***X*** *days after the end of the field mission, and a final version* ***X*** *days after Tdh’s feedback.*
* *Contents of the final report (specify the model to be used and the language) incorporating:*
* ***1 executive summary*** *(max. 3-4 pages) (plus a translation in English or French if necessary)*
* ***1 narrative report*** *(max. 30-40 pages)*
* ***1 summary table with the main conclusions and recommendations*** *(separate the short, medium and long term) and the lessons learned.*
* ***Annexes:*** *Containing the technical details of the evaluation, as well as the terms of reference, surveys protocols and questionnaires, protocols of interviews and observation, tables or graphics, secondary review references, persons and institutions contacted, a PowerPoint presentation of the findings and recommendations. Possibly, include in the contract a provision for the sharing of* ***transcripts*** *by the consultant (rendered anonymous) of interviews, focus groups, observation.*

*Specify the language as well as the target public of the report (external or internal versions). The dates for submission of the deliverables should be stipulated.*

***Inception report and Influence over quality***

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|  | *Our ability to have any influence on the quality of the evaluation decreases rapidly after the preliminary report, as the work progresses.*  *Therefore, the work of revising the inception report is an opportunity to mitigate quality-related risks.*  *(Alnap : Evaluation of Humanitarian Action)* |

# Chronogram

*Specify the expected starting date and the estimated length in terms of working days (recommended), using, if possible, a timetable or a Gantt diagram.*

***For example***

* *Phase I: Preparation and analysis of documentation and briefings:* ***X*** *days 🡪 preliminary report*
* *Phase II: Field work :* ***X*** *days 🡪 presentation and debriefing*
* *Phase III: Analysis & report writing:* ***X*** *days – including the time needed for revision and feedback by Tdh.*

***At least***

*The consultant should undertake to integrate time for briefing in the field into his schedule in addition to basic and coordinated debriefing. As far as possible, a debriefing at Head Office should also be incorporated in the planning.*

*Be careful to provide for the time required for desk review (5 days as a bare minimum, or 10 days depending on the scope of the project or programme). This period is frequently underlooked.*

# Roles and responsibilities

***Specify the role and the responsibilities of the team in charge of managing the evaluation at Tdh.***

For example:

* *Management of communications, organization and provision of the documentation required, logistic arrangements (when this is the case: responsibility and/or facilitation of transport, accommodation, organization of field work), support for translations;*
* *Indicate if any material could possibly be made available to the team of evaluators (including working space, internet, printer, office furniture).*

***Indicate the role and responsibilities of the evaluating teams and the elements of policies to take into account.***

*For example:*

* *Specific procedures (e.g. behaviour towards the media or security measures). Respect for the Child Protection Policy.*
* *Working hours, living conditions, likely bank holidays, likely holiday periods, weekends and whether there are specific constraints in terms of pace of work.*
* *The climate, travel and socio-cultural facts that could influence the collection of data.*
* *Ethics – confidentiality.*

# Profile of the consultant (team): qualifications and experience

Indicate the profile sought for the evaluation:

* *Training,*
* *Experience, expertise*
* *Skills*
* *Language abilities*

*Focus on “must have” and avoid wishes lists. State the basis on which criteria the applications and the CV will be assessed. See also [Consultant selection Grid]. Each requirement should be explicit and should be appraised on reliable sources (e.g. written communication🡪 based on reading previous work done by the consultant).*

# Budget

***In the context of an external consultancy,*** *specify, if possible, the budget instalment foreseen for this evaluation.* ***If preferred, state “the budget will be provided by the consultant in the context of the financial proposal”.***

*Specify here what Tdh can take over, for example: flight ticket, accommodation, per diem, on-site transport, visa, insurance, etc.* 🡺 *See the [budget template] shown in the annex as a proposal.*

# Application procedures

Indicate who is the contact person, the application procedure and the methods of communication (e.g. if it is possible for the consultant to ask questions and how the answers will be communicated).

Then, indicate whether interested candidates should present:

* *A technical offer comprising:*
  + *Understanding of the objective of the study and the Terms of Reference (ToR);*
  + *Methodology and tools proposed;*
  + *A chronogram showing details for the realization of each of the evaluation phases. The schedule proposed should include time for briefing and debriefing at the mission, and at Head Office as far as possible.*
* *A financial offer with a budget detailed by item (fees, other costs);*
* *An updated CV;*
* *An example of similar studies carried out (if possible);*
* *Contacts of 3 references.*

*Indicate whether Tdh should consider individuals or teams of candidates equally.*

*Applicants should send the whole of this documentation in electronic form to* ***XXX****, by (indicate deadline for presenting dossiers)* ***XXX.***

# Reference documents and annexes

*List the documents required for the evaluation preparation.*

*Later, you must ensure that at the time of the preliminary report, all these documents will have been well read by the consultant. As far as possible (to be verified by the persons concerned in the relevant project), attach or give the link to these documents. The logframe can be annexed to the ToR .*

***For example:***

* *Proposal for the project and logframe*
* *Report on the situation analysis*
* *Baseline report*
* *Documents of the project (reports of partner activities, minutes of the follow-up meeting, etc.)*
* *Monograph on the area*
* *Technical or thematic studies*
* *Report of previous evaluations*