

Annex 5: Terms of reference – Portfolio review

Version 1

Used by Pete Golob for CPHP

1. Using CD Rom materials provided and discussions with project leaders, as necessary, assess each of 24 technologies generated by the CPHP in terms of the following criteria and fill in the form provided for this purpose:

- Whether the technology is already described in the TECA technology database? If so, whether or not it should be added?
- Whether the technology is suitable or not for inclusion in the TECA technology database; and if not whether this is because it has not been validated, or it is a decision-support tool, or it is a methodology?
- To what extent has it been validated, using a scale to be developed at ToR1 [see Annex 8]?
- Evidence of validation?

Version 2

Used by Andy Frost for PHFRP, FMSP, AFGRP, LPP, AHP, PSP

1. For the 10 portfolios of projects (using their websites and documentation available from DFID), to identify all of the

- proven technologies
- technologies requiring further validation
- decision-support tools
- methodologies

and log these in a format agreed with Tina Rowland [see 'Four Cats List' at Annex 3].

2. To ensure that each **proven technology** identified in this log

- Meets TECA criteria
- Is not already recorded in TECA
- Has genuinely been validated (see FTR review)

and amend the log accordingly.

3. To validate the log of proven technologies, technologies requiring further validation, decision-support tools and methodologies with each of the Programme Managers.

Version 3

Used by Pete Golob for NRSP

- (i) Identify from the NRSP project portfolio 1995-2006 (located at <http://www.infobridge.org/nrsp/index.asp>) all (a) validated technologies, (b) technologies yet to be validated, (c) decision-support tools, and (d) methodologies.
- (ii) Record the names of these outputs in a spreadsheet provided by Tina Rowland [see 'Four Cats List' at Annex 3], which also asks for brief details of the associated projects.
- (iii) Obtain the programme manager's approval of the lists. Christopher Floyd will be expecting to hear from the project and has already agreed to read through the lists, suggesting any additions, deletions or category changes. The aim here is to make use of the programme manager's institutional memory.
- (iv) Assess whether any of the validated technologies are already in the TECA database (as you did for CPHP) and advise (using the **QC1 spreadsheet** [version 2 at Annex 7] provided by Tina Rowland) whether, if they are already there, they should be added anyway.

Version 4

Used by Simon Eden-Green for CPP

ToR 1 - To identify from the CPP portfolio 1995-2006 (liaising with Frances Kimmins [the programme manager] as necessary):

- (a) validated technologies, including decision-support tools and methodologies, suitable for inclusion in TECA (where validated means 'has got at least beyond proof of concept');
- (b) technologies, including decision-support tools and methodologies, requiring further validation (ie that have not gone beyond proof of concept) and therefore are not suitable for inclusion in TECA;

and record these in a spreadsheet provided by NR International, which also asks for brief details of the associated projects.

NR International will then collate on CD all the FTRs, disseminations and project leaders' contact details relating to items recorded under (a). These will be forwarded on CD Rom to the Company.

ToR 2 - To assess (and record in QC1 spreadsheet provided [version 2 at Annex 7]) whether the **validated** technologies, including methodologies and decision support tools, have already been documented in the TECA technology database; and advise whether or not they should be included if this is the case.