What should a TOR include?

The Terms of Reference (ToR) is a useful document that sets out what you want the evaluation to achieve, and how you want it done. In certain approaches, such as Social Return on Investment approaches, it is prepared in a highly participative way with the involvement of all key stakeholders and forms the starting point for analysis.

Background

- A summary of the rationale for the scheme development. Explain what has led to the decision to do an impact evaluation. Identify the evaluation should reflect your organisation approach.

Evaluation team requirements

- Identify what skills and experience the team doing the evaluation will need to have
- Requirements regarding liability insurance, data protection, confidentiality

Liaison

- Who will be the internal contact person for the evaluator?

Evaluation purpose, objectives and scope

- Explain the rationale for doing an evaluation. Is it to inform learning? If so, how is this learning expected to be applied? Is it to enable you to report to funders?
- The objectives may focus on what effects are produced, which sets of intended beneficiaries benefitted.
- The objectives may also consider the programme's effectiveness – the extent to which the programme's objectives were achieved.
- Scope – is the evaluation is looking at all interventions as part of the project, or only a limited set of interventions?

Data collection

- What information already exists?
- What other sources of information should evaluators refer to?
- How should data be collected? Identify how far you are flexible in terms of approach.
- Who are key sources of knowledge or information?
- Confidentiality of data.

Timescale and budget

- Dates for proposal submission, decision, appointment,
- Timescale for work to be carried out. Timeframe for reviewing draft reports. Desired completion date.
- Available budget. State if budget includes VAT.