



BetterEvaluation

Supporting managers to use
evaluators more effectively:
A Program Managers' Guide to
Evaluation & the GeneraTOR

Associate Professor Greet Peersman & Professor Patricia Rogers
Evidence & Evaluation Hub

The Australia and New Zealand School of Government (ANZSOG)

BetterEvaluation

An international collaboration to improve evaluation practice and theory by sharing and generating information about options (methods or processes) and approaches.

Start here

to learn more about using BetterEvaluation

-GeneraTOR- Terms of Reference generator

Project number	✓	Evaluation questions
Background information	✓	
Scope of the evaluation	✓	
Purpose / Objectives / Rationale	✓	
Intended user(s) and use(s)	✓	
Evaluation questions		
The principles and approach that will guide the evaluation		
Methodology		
Roles and responsibilities		
Evaluation qualifications		
Reporting requirements		
Estimation of the cost		

The issue to be studied in the evaluation and the questions to be answered should be clearly detailed (e.g., what is it you want to find out through this evaluation?).

You cannot evaluate everything so you will need to make strategic choices about what to study. There are many interesting and important questions to be asked, but they need to be prioritized based on the primary intended uses of the evaluation. The questions should be as specific as possible, because vague questions usually yield vague answers.

[Show me more information](#)

[Show me examples](#)

Q1

Announcing the IDRC Program Managers' Guide to Evaluation and the GeneraTOR

Current funding opportunities for research on evaluation

How do you go about analyzing data that has been collected from respondents via a questionnaire?
How to get stakeholders to articulate how they think a project works?

Find options

The [Rainbow Framework](#) organizes 300+ evaluation options into 7 clusters of tasks (shown to the right as coloured tabs).

 **MANAGE**

 **DEFINE**

 **FRAME**

 **DESCRIBE**

 **UNDERSTAND CAUSES**

 **SYNTHESISE**

 **REPORT & SUPPORT USE**

UNDERSTAND CAUSES of outcomes and impacts

Collect and analyze data to answer causal questions about what has produced outcomes and impacts that have been observed. [Read more.](#)

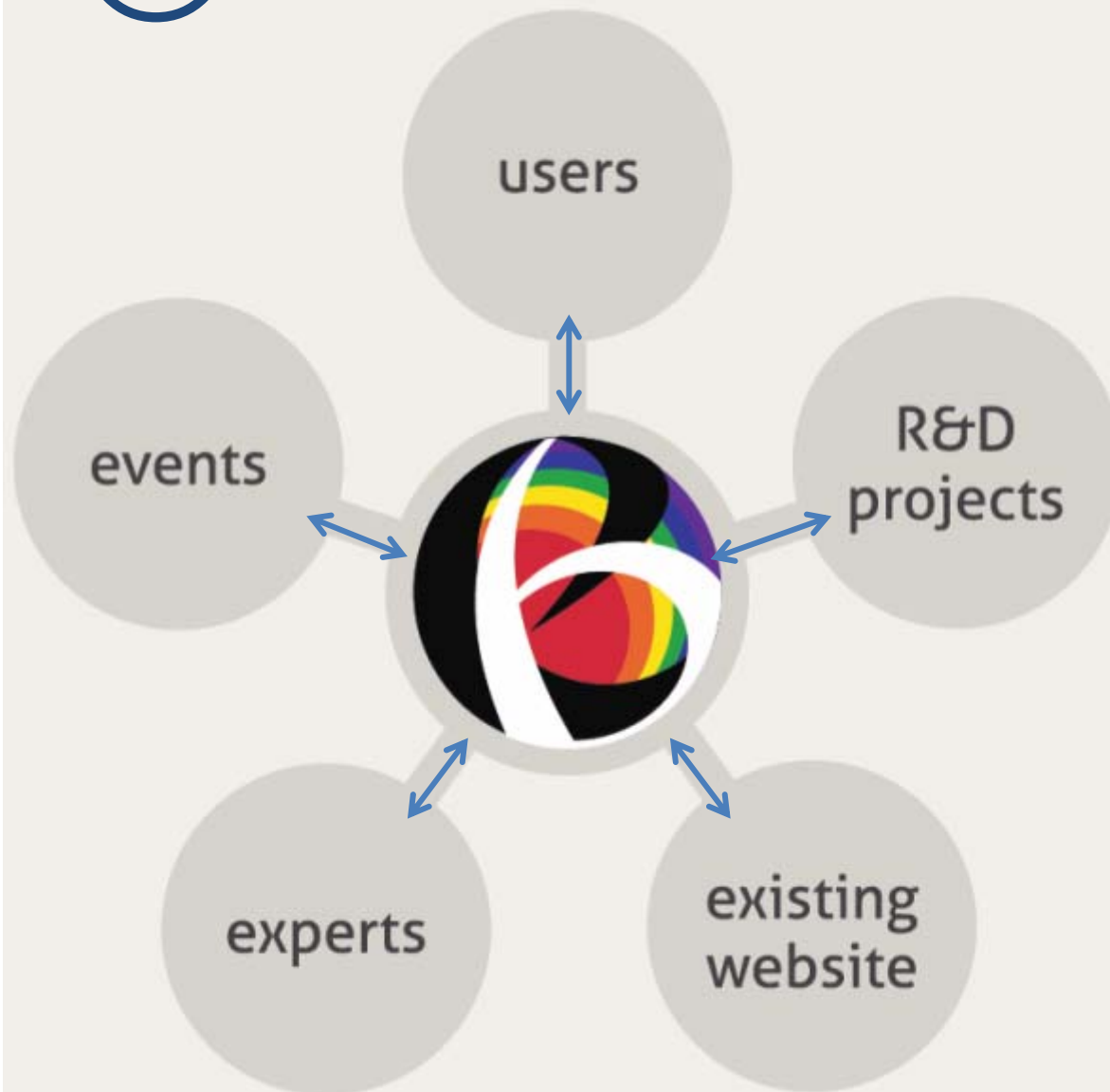
1. Check the results support causal attribution
2. Compare results to the counterfactual
3. Investigate possible alternative explanations



BetterEvaluation

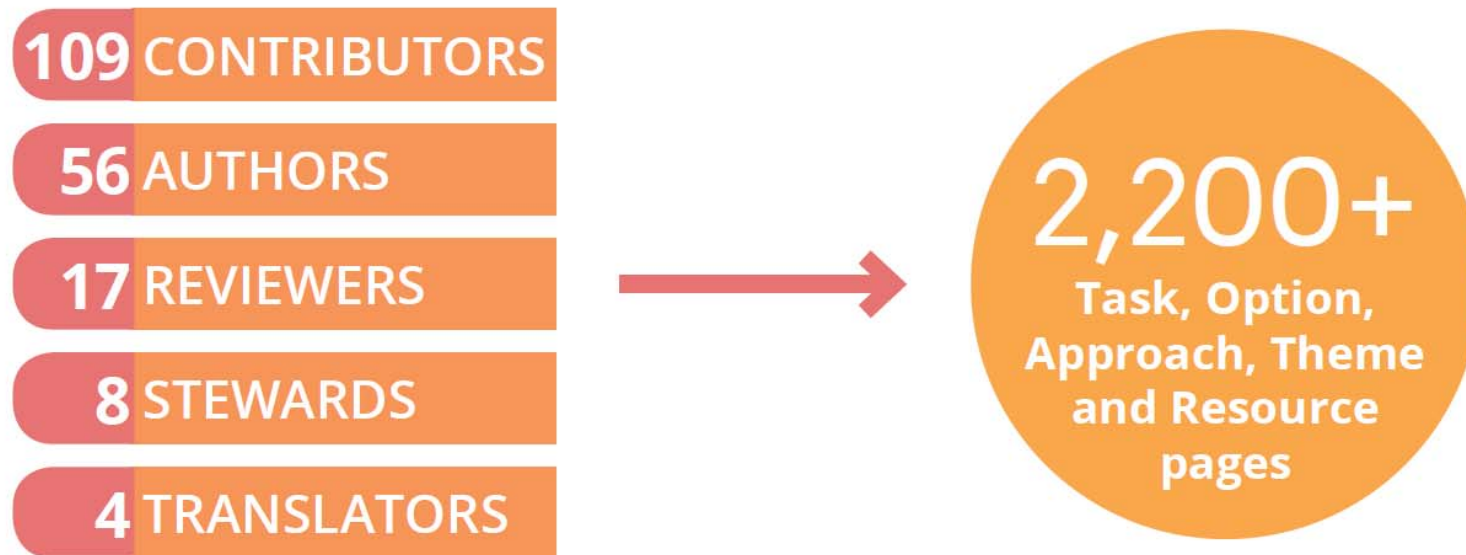


①

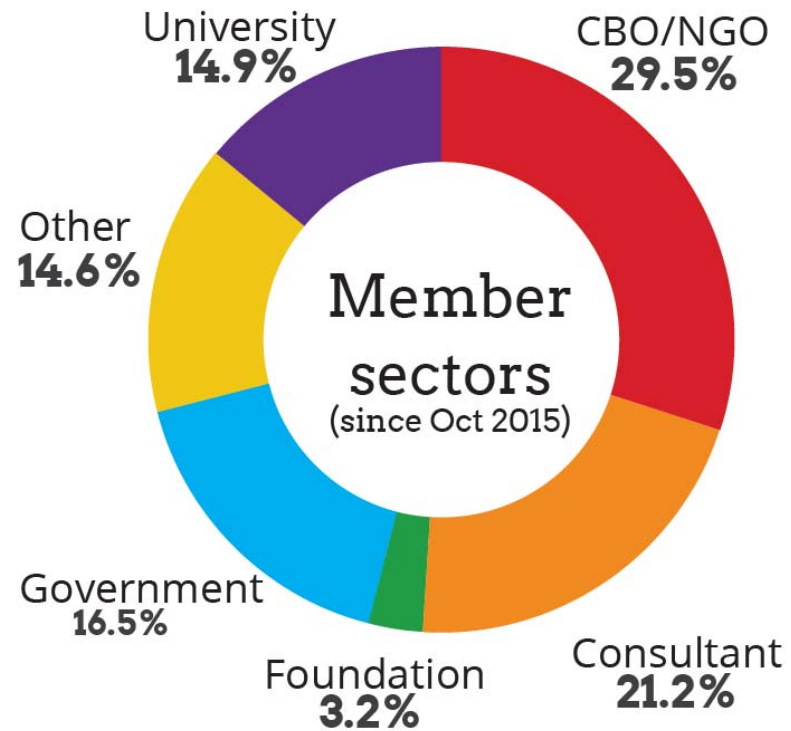


Co-creation by
practitioners,
evaluators,
researchers, sector
experts, method
experts

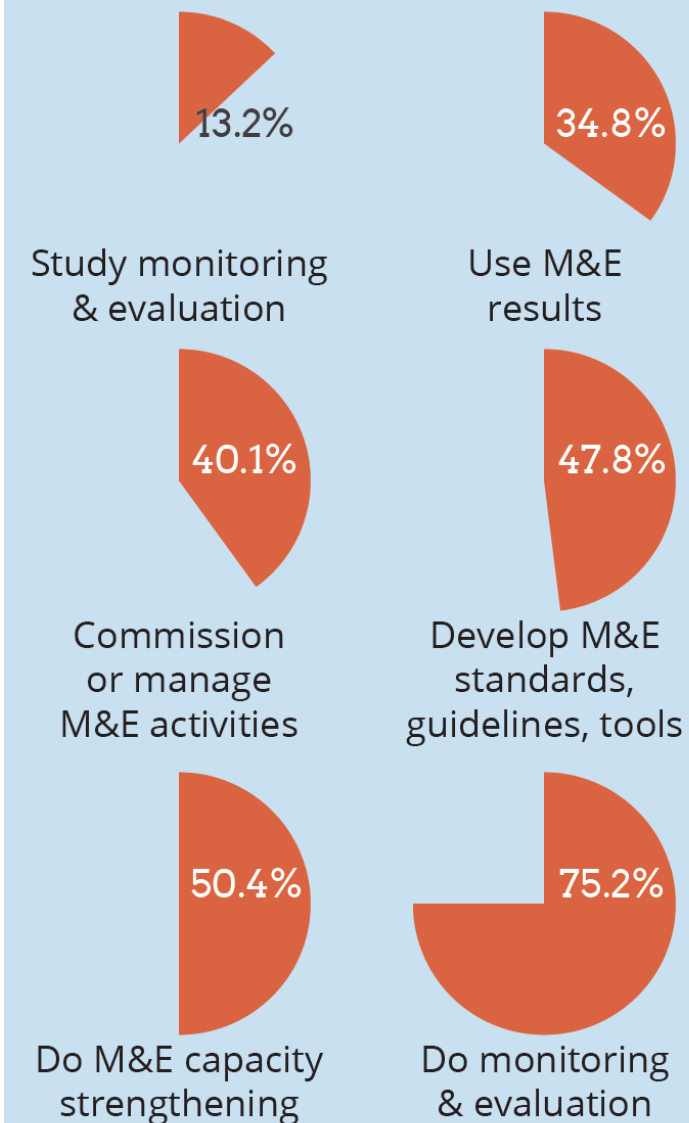
Co-creation, Quality Control and Translation



BE Members [recent only; n=1,413]



Member roles



Countries accessing BE site



②

Task-oriented taxonomy:
Support to navigate
options

Photo: David Masters

③



Rooted in practical experience

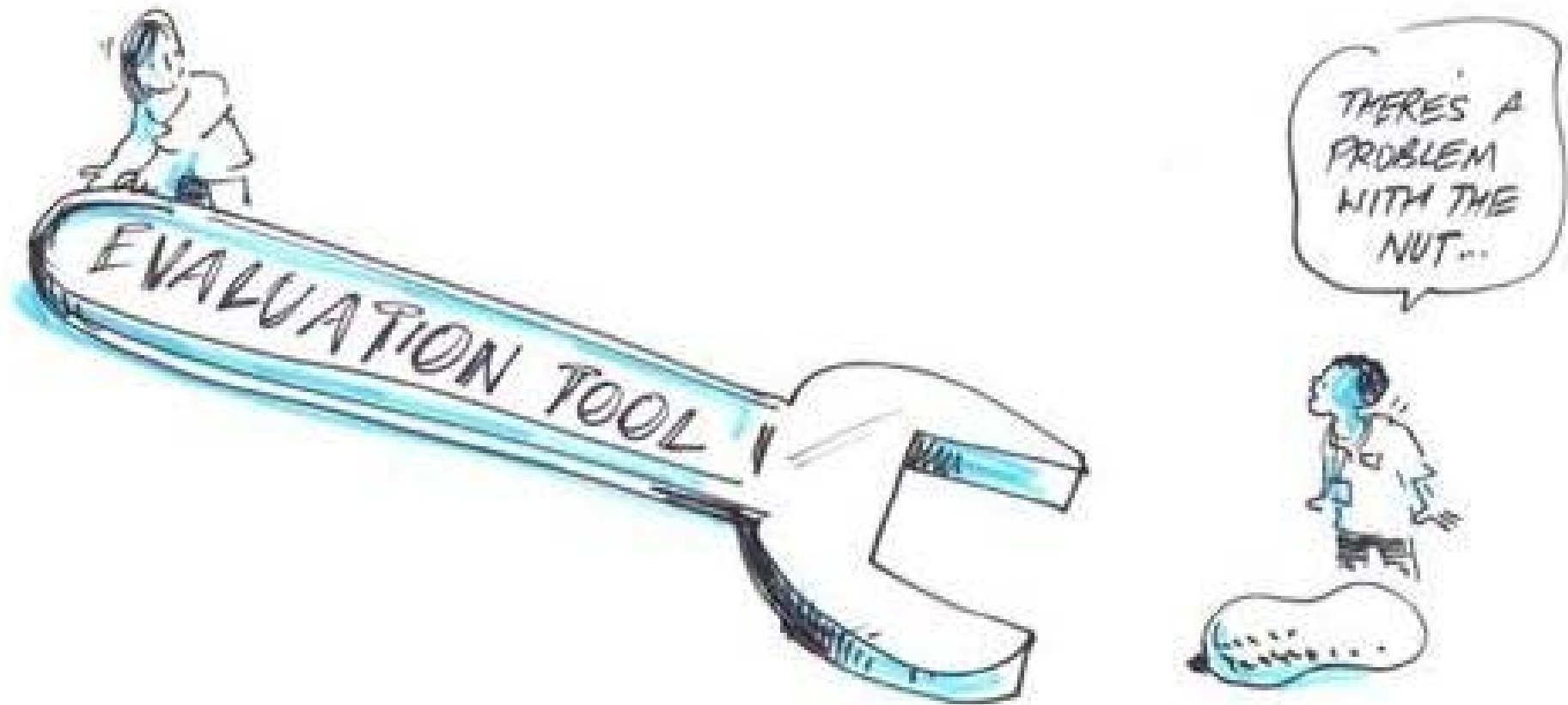
④



Reflection,
processes for
quality and
authenticity

⑤

Methodological pluralism



Simon Kneebone 'Show Me The Change'

<http://www.flickr.com/photos/smtc/sets/72157624112171834/>

A spotlight shines from the top left corner onto a dark blue background filled with small, bright stars. The light from the spotlight creates a soft, glowing area on the floor.

⑥

Spotlight on invisible
evaluation tasks and less
well known methods

7

Respectful,
inclusive and
constructive
discussion



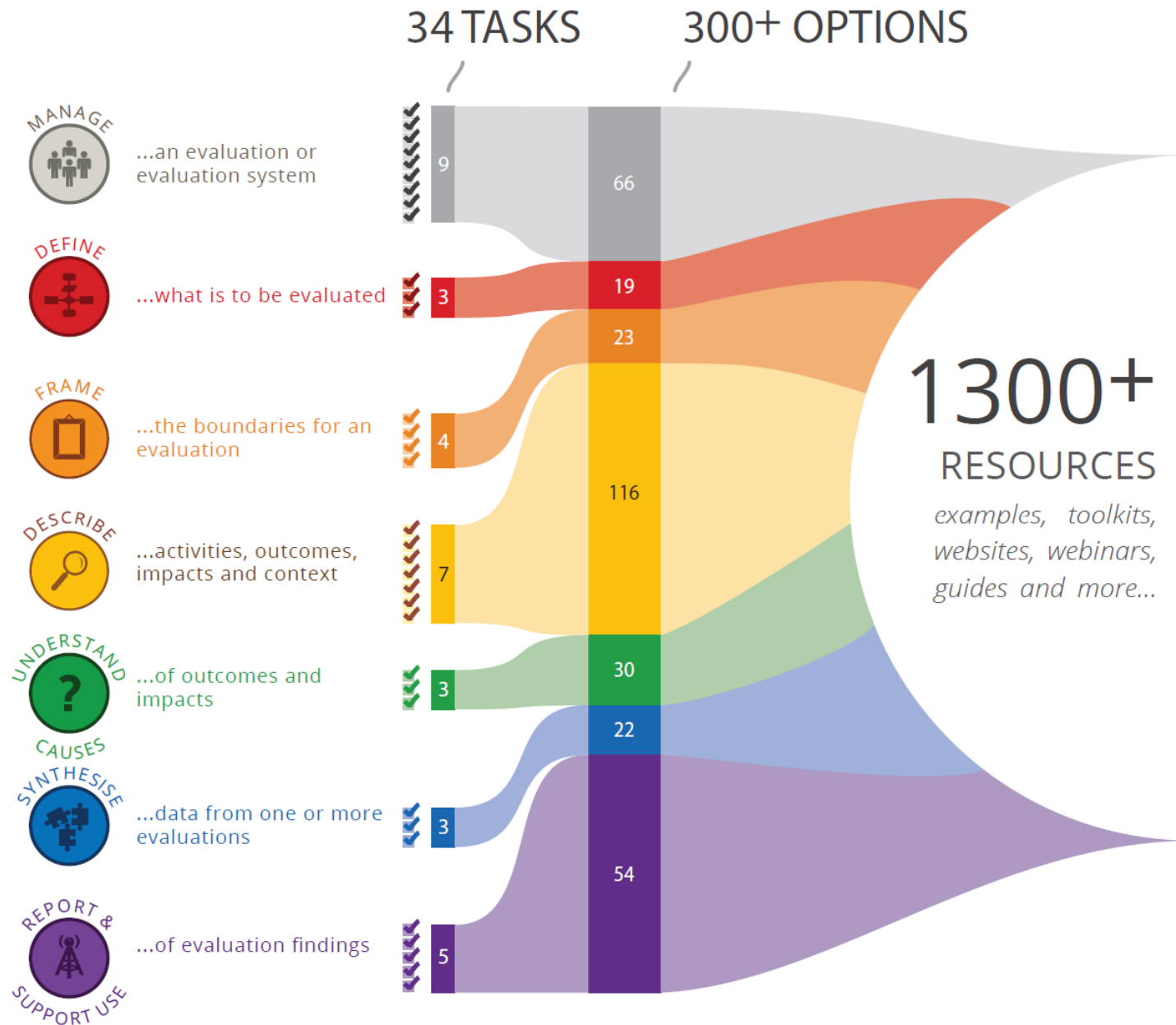


Rainbow Framework – to guide managing, conducting and using evaluation

www.betterevaluation.org

300+ options
related to 34 tasks
organized in 7 clusters





Planning an Evaluation: Using the Rainbow Framework

The BetterEvaluation Rainbow Framework can help you to plan an evaluation by promoting key questions. This can be used to develop an evaluation plan, a Terms of Reference, or a logic model, considering these issues, including reporting, at the beginning of an evaluation. An expanded set of options or methods for each question can be downloaded from our website: <http://betterevaluation.org>

MANAGE	<p>1. MANAGE an evaluation or evaluation system</p> <p>Manage an evaluation (or a series of evaluations), including deciding who will be involved and who will make decisions about it.</p>		<p>4. DESCRIBE activities, outcomes, impacts and context</p> <p>Collect and retrieve data to answer descriptive questions about the activities of the project/program/policy, the various results it has had, and the context in which it has been implemented.</p>
MANAGE	<p>Understand and engage with stakeholders: Who needs to be involved and how should they be identified and engaged?</p> <p>Establish decision making processes: Who will have the authority to make decisions about the evaluation? Who will provide advice or make recommendations? What processes will be used for making decisions?</p> <p>Decide who will conduct the evaluation: Who will actually undertake the evaluation?</p> <p>Determine and secure resources: What resources (time, money, and expertise) are needed for the evaluation and how can they be obtained? Consider both internal (e.g. previous participants' time).</p> <p>Define ethical and quality evaluation standards: What will be considered good practice in the evaluation? How should ethical issues be addressed?</p> <p>Document management processes and agreements: How will you document the management processes and agreements made?</p> <p>Develop evaluation plan or framework: What is the overall plan for the evaluation framework across several related evaluations?</p> <p>Review evaluation (do meta-evaluation): How will the evaluation itself be evaluated? What process, and report?</p> <p>Develop evaluation capacity: How can the ability of individuals, groups, and organizations to use evaluations be strengthened?</p>	DESCRIBE	<p>Sample: What sampling strategies will you use for collecting data?</p> <p>Use measures, indicators or metrics: What measures or indicators will be used? Are there existing ones that should be used or will you need to develop new measures and indicators?</p> <p>Collect and/or retrieve data: How will you collect and/or retrieve data about activities, results, context and other factors?</p> <p>Manage Data: How will you organize and store data and ensure its quality?</p> <p>Combine qualitative and quantitative data: How will you combine qualitative and quantitative data?</p> <p>Analyze data: How will you investigate patterns in the numeric or textual data?</p> <p>Visualize data: How will you display data visually?</p>
DEFINE	<p>2. DEFINE what is to be evaluated</p> <p>Develop a description (or access an existing version) of what is to be evaluated and how it will be done.</p>		<p>5. UNDERSTAND CAUSES of outcomes and impacts</p> <p>Collect and analyze data to answer causal questions about what has produced outcomes and impacts that have been observed.</p>
DEFINE	<p>Develop initial description: What exactly is being evaluated?</p> <p>Develop program theory / logic model: How is the intervention understood to work? (e.g. theory of change, logic model)?</p> <p>Identify potential unintended results: What are possible unintended (positive or negative) that will be important to address in the evaluation?</p>	UNDERSTAND CAUSES	<p>Check the results support causal attribution: How will you assess whether the results are consistent with the theory that the intervention produced them?</p> <p>Compare results to the counterfactual: How will you compare the factual with the counterfactual - what would have happened without the intervention?</p> <p>Investigate possible alternative explanations: How will you investigate alternative explanations?</p>
FRAME	<p>3. FRAME the boundaries for an evaluation</p> <p>Set the parameters of the evaluation – its purposes, key evaluation questions, and standards to be used.</p>		<p>6. SYNTHESIZE data from one or more evaluations</p> <p>Combine data to form an overall assessment of the merit or worth of the intervention, or to summarize evidence across several evaluations.</p>
FRAME		SYNTHESIZE	<p>Synthesize data from a single evaluation: How will you synthesize data from a single evaluation?</p> <p>Synthesize data across evaluations: Do you need to synthesize data across evaluations? If so, how should this be done?</p> <p>Generalize findings: How can the findings from this evaluation be generalized to the future, to other sites and to other programs?</p>
			<p>7. REPORT AND SUPPORT USE of findings</p> <p>Develop and present findings in ways that are useful for the intended users of the evaluation, and support them to make use of them.</p>
		SUPPORT USE	<p>Identify reporting requirements: What timeframe and format is required for reporting?</p> <p>Develop Reporting Media: What types of reporting formats will be appropriate for the intended users?</p> <p>Ensure accessibility: How can the report be easy to access and use for different users?</p> <p>Develop recommendations: Will the evaluation include recommendations? How will these be developed and by whom?</p>

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to learn more about using BetterEvaluation

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- [BetterEval: World](#)
- [Events](#)
- [Download the Rainbow Framework](#)
- [Writeshops cases](#)
- [New material](#)
- [Equal access participatory M&E toolkit](#)
- [NSW Government Evaluation Toolkit](#)
- [Impact Evaluation Series](#)
- [The Managers' Guide to Evaluation and GeneraTOR](#)

Case Method

The Managers' Guide to

Find options

The [Rainbow Framework](#) organizes 300+ evaluation options into 7 clusters of tasks (shown to the

 **MANAGE**

 **DEFINE**

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 **UNDERSTAND**

DESCRIBE activities, outcomes, impacts and context

Collect and retrieve data to answer descriptive questions about the activities of the project/program/ policy, the various results it has had, and the context in which it has been implemented. [Read more.](#)

1. Sample
2. Use measures, indicators or metrics
3. Collect and/or retrieve data
4. Manage data
5. Combining qualitative and quantitative data
6. Analyse data
7. Visualise data

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Start Here

Steps in planning and
managing an evaluation

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method to use

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material

About us

- ▶ Interactive guidance organised around 9 key steps
- ▶ Adaptable Terms of Reference (TOR) template; produces a draft TOR document
- ▶ Broad relevance – with specific resources on evaluating research for development
- ▶ Draws on existing and newly created materials
- ▶ General guidance and links to detailed resources – including links to the full BetterEvaluation site
- ▶ Freely available in English and French



Program Managers' Guide to Evaluation

www.betterevaluation.org/managers-guide

1. Decide how decisions about the evaluation will be made

2. Scope the evaluation

3. Develop the Terms of Reference

4. Engage the evaluation team

5. Manage development of the evaluation methodology

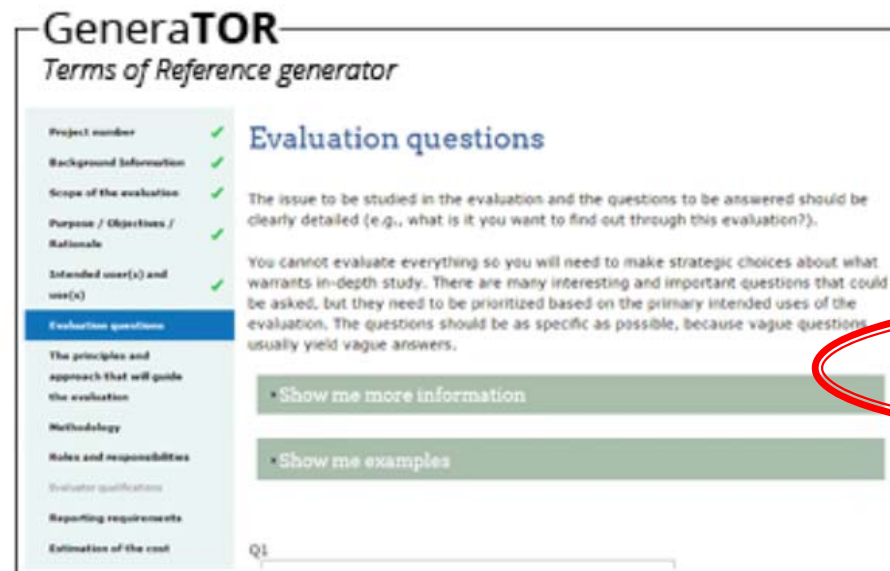
6. Manage development of the evaluation work plan

7. Manage implementation of the evaluation

8. Guide production of quality report(s)

9. Disseminate reports and support use of evaluation

How to access the GeneraTOR:



The Generator sits within Step 3 of the Managers' Guide: Develop the Terms of Reference (ToR).

To access the GeneraTOR you will need to sign in as

a BetterEvaluation member, which is also free. [Login](#) to

your BetterEvaluation account and hit the "GeneraTOR" tab on your [profile](#)

[page](#). (You can [join BetterEvaluation here](#) if you aren't already a member).



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-GeneraTOR- Terms of Reference generator

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MANAGE



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UNDERSTAND
CAUSES



SYNTHESISE



REPORT &
SUPPORT USE

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Collect and analyze data to answer causal questions about what has produced outcomes and impacts that have been observed. [Read more.](#)

1. Check the results support causal attribution
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GeneraTOR

[View](#)[Edit](#)[GeneraTOR](#)[Messages](#)[Newsletter Subscriptions](#)[OpenID identities](#)[Page Subscriptions](#)[Create terms of reference](#)[Cr  er le mandat](#)[Post date](#)▼[Title](#)

21st January 2017 - 4:46pm

[Testing the TORs](#)[Download](#)

[Click here](#) to go straight to creating a new TOR and [click here](#) for the [French](#) version. Note: You'll need to be [logged in](#) to create a terms of reference.

Below is a screenshot of the GeneraTOR. The left hand side allows you to navigate through the various sections of a ToR. Typically, a good ToR would include these sections and many organisations use them in their standard TOR template.

GeneraTOR

Terms of Reference generator

Project number

[Background Information](#)

Methodology

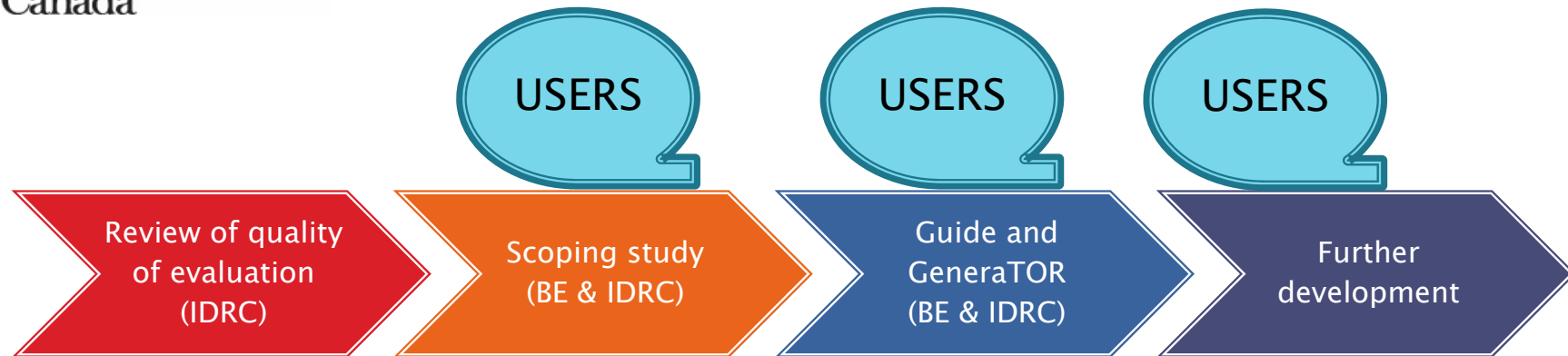
Once the overall evaluation design has been selected, the methods of investigation should be articulated and should be consistent with answering the evaluation questions, the intended users/uses, the principles and approaches as well as the budget and timeline for the evaluation.

STEPS IN THE COMMISSIONING PROCESS

1. Decide how decisions about the evaluation will be made
2. Scope the evaluation
3. Develop the Terms of Reference (ToR)
4. Engage the evaluation team
5. Manage development of the evaluation methodology
6. Manage development of the evaluation work plan including logistics
7. Manage implementation of the evaluation
8. Guide production of quality report(s)
9. Disseminate reports and support use of evaluation

1. Déterminer de quelle façon les décisions concernant l'évaluation seront prises
2. Définir la portée de l'évaluation
3. Élaborer le mandat
4. Engager l'équipe d'évaluation
5. Gérer la conception des évaluations
6. Gérer l'élaboration du plan de travail de l'évaluation, y compris la logistique
7. Gérer la mise en oeuvre de l'évaluation
8. Guider la production de rapports de qualité
9. Diffuser les rapports et appuyer l'utilisation de l'évaluation

Guide Development Process



Step 1

Decide how decisions about the evaluation will be made

Decide how decisions will be made on: the focus of the evaluation; choosing the evaluator / evaluation team; approving the evaluation design; approving evaluation reports and who can access the final report(s) and data.

[Read More](#)

Sub-steps:

- Identify who will be involved in decisions and what their roles will be
- Specify responsibilities of the evaluation manager and the evaluator(s)
- Address particular evaluation management issues relating to joint projects, including donor partnerships

Step 1: Decision Making

Decide how decisions about the evaluation will be made

Also available in: [Français](#)

What it is:

There are many decisions to be made in an evaluation including: the focus of the evaluation (including the key evaluation questions); choosing the evaluator / evaluation team; approving the evaluation design; approving the evaluation report(s) and who can access them.

It is important to be clear about who will be involved in making these decisions, what their role will be and how the decisions will be made.

Always check if existing processes and structures can be used; if these are not appropriate or adequate, then new ones may need to be established for the purposes of the specific evaluation. Also consider any pre-established agreements such as, for example, partnership agreements.

Control of the evaluation process may be centralised in a dedicated manager or committee or it may be shared by a working group involving representatives from many different stakeholders. It is important to describe clearly each actor / entity's role to avoid confusion, duplication of effort or things falling through the cracks.

What it involves:

Sub-steps:

- [Identify who will be involved in decisions and what their roles will be](#)
- [Specify responsibilities of the evaluation manager and the evaluator\(s\)](#)
- [Address particular evaluation management issues relating to joint projects, including donor partnerships](#)

STEPS IN THE COMMISSIONING PROCESS

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Step 1: Decision Making

Sub-step 1

You are currently here:

1. Decide how decisions about the evaluation will be made

- **Identify who will be involved in decisions and what their roles will be**

[Click here to view full menu](#)

Example of a Decision Making Matrix

	Technical advisory committee	Evaluation steering group	Program manager	Senior management
Focus of evaluation	Consulted	Recommends	Approves	Informed
Selection criteria for evaluator/evaluation team	Consulted	Recommends	Approves	Informed
Choosing evaluator/evaluation team	Consulted	Approves	(included in steering group)	Informed
Evaluation design	Consulted	Approves	(included in steering group)	Informed
Evaluation report	Consulted	Approves	(included in steering group)	Informed
Release of report and data	Consulted	Consulted	Recommends	Approves

Step 1: Decision Making

Sub-step 2

You are currently here:

1. Decide how decisions about the evaluation will be made
 - **Specify responsibilities of the evaluation manager and the evaluator(s)**

[Click here to view full menu](#)

The evaluation manager is responsible for:

- Ensuring that the evaluation runs according to plan (see [Step 6](#)) and meets the milestones or deliverables on time
- Problem-solving where needed (or direct issues to the relevant individual / entity to address)
- Ensuring evaluators have access to all relevant project / program documents and stakeholders involved in the project / program and/or the evaluation (see [Step 7](#))

It is crucial to the success of the evaluation...

... that the evaluation manager:

- is formally identified
- has a clear understanding of the scope of her/his authority (i.e., knows what she/he can decide herself/himself related to the running of the evaluation and what she/he needs to get clearance for and from whom)
- can access relevant information and staff (of the organisation commissioning the evaluation and of the intervention implementers)

Step 1: Decision Making

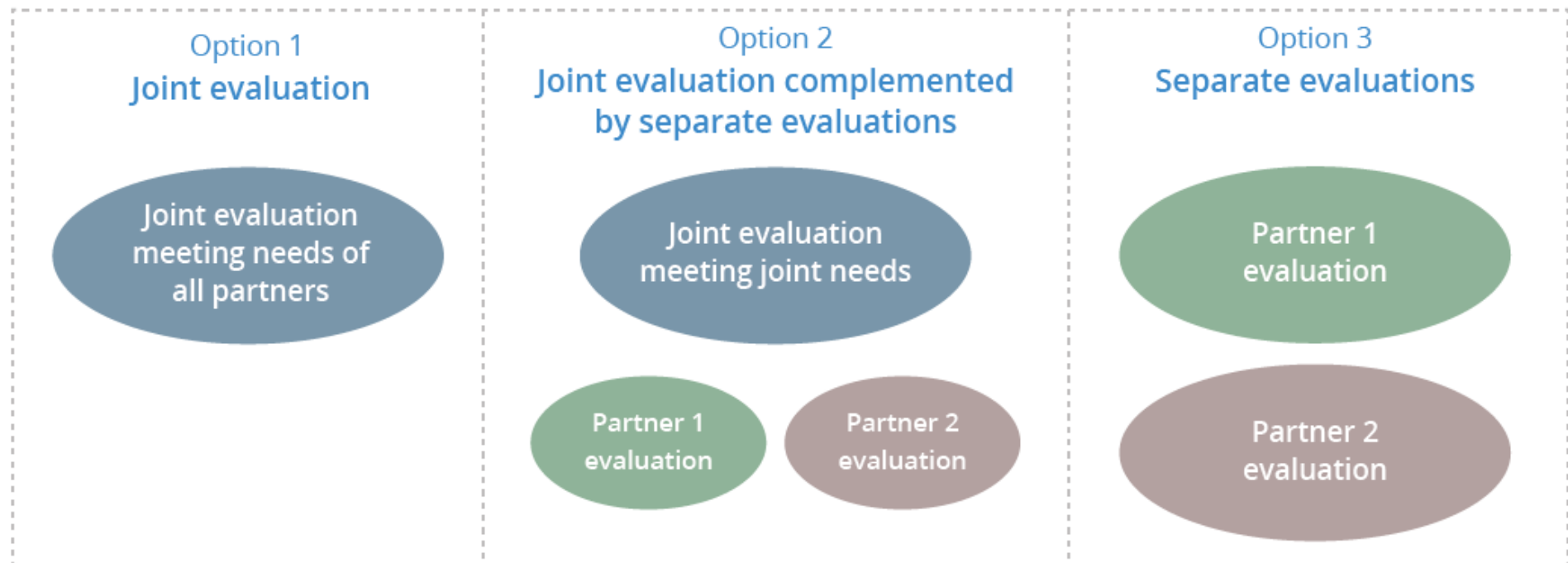
Sub-step 3

You are currently here:

1. Decide how decisions about the evaluation will be made
 - Address particular evaluation management issues relating to joint projects, including donor partnerships

[Click here to view full menu](#)

Different Options for Joint Evaluations



Scope the evaluation

Also available in: [Français](#)

What it is:

It is important to take the time to consider carefully what the evaluation needs to do before thinking through possible evaluation designs. Ensure all those who need to be consulted during this process are adequately involved.

What it involves:

Sub-steps:

- [Clarify what will be evaluated](#)
- [Describe the theory of change](#)
- [Identify who are the primary intended users of the evaluation and what will they use it for](#)
- [Develop agreed key evaluation questions](#)
- [Decide the timing of the evaluation](#)
- [Decide whether the evaluation will be done by an external team, an internal team or a hybrid of both](#)
- [Determine the evaluator qualities](#)
- [Identify what resources are available for the evaluation and what will be needed](#)

SEARCH THIS GUIDE:

STEPS IN THE COMMISSIONING PROCESS

1. Decide how decisions about the evaluation will be made
2. *Scope the evaluation*
3. Develop the Terms of Reference (ToR)
4. Engage the evaluation team
5. Manage development of the evaluation methodology
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Step 2 Scope the evaluation

Take the time to consider carefully what the evaluation needs to do before considering possible designs. Ensure all those who need to be consulted during this process are adequately involved.

[Read More](#)

Sub-steps:

- Clarify what will be evaluated
- Describe the theory of change
- Identify who are the primary intended users of the evaluation and what will they use it for
- Develop agreed key evaluation questions
- Decide the timing of the evaluation
- Decide whether the evaluation will be done by an external team, an internal team or a hybrid of both
- Determine the evaluator qualities
- Identify what resources are available for the evaluation and what will be needed

Step 3 Develop the Terms of Reference (ToR)

Develop the formal document that outlines the requirements for the evaluation.

FEEL FREE TO USE A UNIQUE, FREE SOFTWARE to write your ToR:

You can use a template in a wordprocessing software to write the ToR for your evaluation or you can use the **GeneraTOR** below which will guide you through writing the different sections of a ToR / RFP. It will generate a word document with your saved information which can then be further refined and/or reviewed by others.

Here is a snapshot of the software:

GeneraTOR

Terms of Reference generator

Project number

Background information ✓

Scope of the evaluation

Purpose / objectives / rationale ✓

Intended user(s) and use(s) ✓

Evaluation questions ✓

The principles and approach that will guide the evaluation

Methodology

Roles and responsibilities

Evaluator qualifications

Methodology

Once the overall evaluation design has been selected, the methods of investigation should be articulated and should be consistent with answering the evaluation questions, the intended users/uses, the principles and approaches as well as the budget and timeline for the evaluation.

The methodology section should specify as much detail as possible for each of the following:

Information sources / data collection instruments, protocols and procedures

Retrieving existing documents and data

- ☐ Formal policy documents, implementation plans and reports
- ☐ Official statistics
- ☐ Program monitoring data
- ☐ Program records
- ☐ Other

Collecting data from individuals or groups

- ☐ Interviews
- ☐ Questionnaire or survey
- ☐ Specialized methods

To access the **GeneraTOR**, [login](#) to your BetterEvaluation account and hit the "GeneraTOR" tab on your [profile page](#).

Not yet a BetterEvaluation member? Click [join](#) and follow the instructions to create an account.

[Read More](#)

Why the GeneraToR is important

1. Systematically covers elements of ToR found to be important
2. Offers a limited number of options at each stage – less overwhelming
3. Examples are built in and can be added to
4. Keeps track of which sections have been completed
5. Produces a draft document in Word format that can be shared and further developed
6. Can prompt organisational development such as:

Demand: quality assurance processes for the evaluation

Enabling environment: organisational processes for procurement (e.g., indicating budget, approaching potential suppliers)

Create Terms of Reference

Title *

Provide a short, descriptive title for the evaluation:

Project number



Background Information

Scope of the evaluation

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Intended user(s) and use(s)

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Estimation of the cost

Procedures and logistics

Timeline and milestones

Quality assessment of the evaluation report

Annexes

Background Information

Write concise information about the pertinent project/program/issue to be investigated, the nature of the problem being pursued, historical, and environmental information as well as the organizational context in which the evaluation will occur.

Situate the important stakeholders, including donors, partners, implementing agencies and organizations.

☐ Mark this section as complete.

Previous

Next

Save

Save

Create Terms of Reference

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Provide a short, descriptive title for the evaluation:

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Background Information



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Scope of the evaluation

☒ This section is required for my Terms of Reference.

This refers to the boundaries, goals and/or limits of the evaluation.

Write concise information (as relevant) about: the activities, or aspects of activities, that are to be evaluated; the time period covered; geographical focus; target groups.

Also indicate items/issues that are outside of the scope of the evaluation (if any).

☐ Mark this section as complete.

Previous

Next

Save

Save

Create Terms of Reference

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Provide a short, descriptive title for the evaluation:

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Background Information



Scope of the evaluation



**Purpose / Objectives /
Rationale**



Intended user(s) and
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Purpose / Objectives / Rationale

Provide a clear and succinct response to the question: Why are we doing this evaluation?

☒ Mark this section as complete.

Previous

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Save

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Background Information



Scope of the evaluation



Purpose / Objectives /

Rationale



**Intended user(s) and
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Intended user(s) and use(s)

Specify the intended user(s) and use(s) of the evaluation. From beginning to end, the evaluation process is designed and carried out around the needs of the primary intended users. They have the responsibility to do things differently (e.g., make decisions, change strategies, take action, change policies, etc.) because of their engagement in the evaluation process or with the evaluation findings.

Articulate the uses of both the evaluation findings and the processes:

- Using the findings of an evaluation can entail: making judgments of merit or worth; facilitating improvements, or generating knowledge.
- Process use(s) occur as a result of the learning that happens during the evaluation process. It is evidenced by changes in procedures and culture.

☐ Mark this section as complete.

Previous

Next

Save

Save

Create Terms of Reference

Title *

Provide a short, descriptive title for the evaluation:

- Project number ✓
- Background Information ✓
- Scope of the evaluation ✓
- Purpose / Objectives / Rationale ✓
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Evaluation questions

The issue to be studied in the evaluation and the questions to be answered should be clearly detailed (e.g., what is it you want to find out through this evaluation?).

You cannot evaluate everything so you will need to make strategic choices about what warrants in-depth study. There are many interesting and important questions that could be asked, but they need to be prioritized based on the primary intended uses of the evaluation. The questions should be as specific as possible, because vague questions usually yield vague answers.

▸ Show me more information

▸ Show me examples

Q1

Add another question

☐ Mark this section as complete.

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The principles and approach that will guide the evaluation

The principles and approach that will guide the evaluation (e.g., transparency, partnership, openness, cost-effectiveness, etc.), should be articulated.

Given the nature of international development, addressing gender awareness and cultural sensitivity should be incorporated into this section.

Also include a statement on the need for the evaluator to follow appropriate ethical procedures.

☐ Mark this section as complete.

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The methodology section should specify as much detail as possible on:

Information sources / data collection instruments, protocols and procedures

Retrieving existing documents and data

- ☐ Formal policy documents, implementation plans and reports
- ☐ Program monitoring data
- ☐ Official statistics
- ☐ Program records
- ☐ Other

Collecting data from individuals or groups

- ☐ Interviews
- ☐ Questionnaire or survey
- ☐ Specialized methods

Observation

- ☐ Structured or non-structured

— — — — —

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Roles and responsibilities

By clearly delineating roles and responsibilities of all those involved in the evaluation process, you are more likely to avoid substantive, administration and communication problems.

Consider the following and outline clearly who will do what:

- Who will collect and analyze data?
- Who will facilitate use?
- Who will present/disseminate findings?
- Who will write the report?
- Who will participate in what meetings/workshops?
- Who will make logistical arrangements?
- Who will provide information and access to documents?
- Who will manage the contract/evaluation process and serve as a liaison with the evaluator/evaluation team?
- Who will approve the final products?
- Who will arrange and participate in travel?

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☒ This section is required for my Terms of Reference.

Describe the composition and responsibilities of the evaluator or evaluation team leader and each team member. Distinguish between desired and mandatory competencies, as well as whether competencies are required by the whole team or by selected team members.

Multidisciplinary teams are often appropriate – the qualification and skill areas to be specified could include: areas of technical competence, language proficiency, in-country or regional work experience, process management skills such as facilitation skills, appropriate mix of male and female evaluators.

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Reporting requirements

The reporting requirements should spell out the desired:

- Format (oral, written, video, etc)
- Dissemination materials (summary, briefs, presentation materials, newsletter article, etc.)
- Intended audience(s)
- Content
- Length
- Decision on whether the evaluation report should/should not include recommendations
- Decision on whether you want the completed data sets returned (filled out questionnaires, surveys, interview notes and tapes, etc.)
- Method of delivery (All reports should be electronically delivered to IDRC in addition to any other form of delivery)
- Restriction/permission to publish material derived from the evaluation

Refer to Evaluation Guidelines 3 "Formatting Evaluation Reports at IDRC" to be provided to the evaluator/evaluation team.

☐ Mark this section as complete.

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Provide a short, descriptive title for the evaluation:

Project number	✓	<h2>Estimation of the cost</h2> <p>An accurate and detailed estimation of the cost of the evaluation for the Fees or Expenses portion of the contract should be presented.</p> <p>An evaluation budget should include the costs of:</p> <ul style="list-style-type: none">• Personnel (e.g. evaluator(s), research assistant, support staff, etc.) per day or lump sum• Travel (transportation, per diem, travel mobilization expenses, consider class of travel)• Supplies, equipment and Direct communication costs such as phone, fax, email, postage• Translation• Copying and printing• Workshops (design, findings verification, utilization, etc.)• Facilitation of use by intended user <div><p>IDRC-SPECIFIC INSTRUCTION: While IDRC cannot purchase equipment or pay overhead on a</p><p>confidential information</p></div>
Background Information	✓	
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Purpose / Objectives / Rationale	✓	
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Evaluation questions	✓	
The principles and approach that will guide the evaluation	✓	
Methodology	✓	
Roles and responsibilities	✓	
Evaluator qualifications	✓	
Reporting requirements	✓	
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Add new file

Attach estimated costs or costing template

No file chosen

Files must be less than **5 MB**.
Allowed file types: **doc docx xls xlsx**.

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☒ This section is required for my Terms of Reference.

As relevant, specify the support that will be provided or any special requirements/considerations:

- Special procedures, e.g., relations with press or security
- Work hours, holidays and requirements
- Weather, travel and socio-cultural conditions that may influence data collection
- Availability and provision of services (local translators, interviewers, etc)
- Availability and provision of office space, cars, laptops, etc

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Timeline and milestones

Detail the timeline and milestones that will need to be achieved. You can break the phases into:

- Planning
- Data collection / collation
- Data analysis
- Reporting
- Facilitation of use
- Payment schedule for fees/expenses if applicable

Add new file

Attach required timeline or template

No file chosen

Files must be less than **20 MB**.

Allowed file types: **doc docx xls xlsx**.

☐ Mark this section as complete.

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Quality assessment of the evaluation report

Indicate that the quality of the evaluation report the evaluator(s) produce will be assessed.

IDRC-SPECIFIC INSTRUCTION: This will be judged by IDRC's Evaluation Unit on four internationally recognized standards: utility, feasibility, accuracy, and propriety. Refer to the Evaluation Guidelines 4 "Quality Assessment of IDRC Evaluation Reports" to be provided to the evaluator/evaluation team.

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Annexes

Indicate which information will need to be provided in an annex, such as: details of any monitoring and evaluation frameworks that have direct relevance to the study; terms of reference for any management or reference groups overseeing the study; editorial requirements for consultants preparing evaluation reports; evaluation guidance notes such as on ethics, etc

☐ Mark this section as complete.

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GeneraTOR

[View](#)[Edit](#)[GeneraTOR](#)[Messages](#)[Newsletter Subscriptions](#)[OpenID identities](#)[Page Subscriptions](#)[Create terms of reference](#)[Cr  er le mandat](#)[Post date](#)▼[Title](#)

21st January 2017 - 4:46pm

[Testing the TORs](#)[Download](#)

[Click here](#) to go straight to creating a new TOR and [click here](#) for the [French](#) version. Note: You'll need to be [logged in](#) to create a terms of reference.

Below is a screenshot of the GeneraTOR. The left hand side allows you to navigate through the various sections of a ToR. Typically, a good ToR would include these sections and many organisations use them in their standard TOR template.

GeneraTOR

Terms of Reference generator

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Methodology

Once the overall evaluation design has been selected, the methods of investigation should be articulated and should be consistent with answering the evaluation questions, the intended users/uses, the principles and approaches as well as the budget and timeline for the evaluation.

Step 4 Engage the evaluation team

Evaluations can be conducted by in-house staff (internal) or a third party (external) or a mix of both. Advertising the Terms of Reference (ToR) / Request for Proposal (RFP) is the first step in engaging external evaluators but other important issues need to be addressed to ensure an effective and transparent selection process and to orient the selected evaluator(s).

[Read More](#)

Sub-steps:

- Advertise the evaluation Terms of Reference (ToR) / Request for Proposal (RFP)
- Select an evaluator / evaluation team
- Prepare the contract
- Orient the evaluator / evaluation team

Engage the evaluation team

Also available in: [Français](#)

What it is:

Once the decision to use external evaluator(s) has been made, sufficient time should be allowed to engage them. Good evaluation consultants are typically busy, so provide enough lead time for them to fit potential new work into their schedules.

What it involves:

Sub-steps:

- [Advertise the evaluation Terms of Reference \(ToR\) / Request for Proposal \(RFP\)](#)
- [Select an evaluator / evaluation team](#)
- [Prepare the contract](#)
- [Orient the evaluator / evaluation team](#)

Products

- Call for Expression of Interest (IoE)
- Evaluation proposal
- Evaluator(s) selection criteria for shortlisting
- Evaluator(s) final selection questions
- Reference check questions
- Consultant contract
- Briefing book or project documentation center

IDRC-SPECIFIC INFORMATION:

If you are an IDRC member, please login to see information specific to IDRC.

Next: [Step 4 \(Sub-step\). Advertise the evaluation Terms of Reference \(ToR\) / Request for Proposal \(RFP\)](#)

Back: [Step 3. Develop the Terms of Reference \(ToR\)](#)

You are currently here:

4. Engage the evaluation team

[Click here to view full menu](#)

Step 5 Manage development of the evaluation methodology

An evaluation design describes how data will be collected and analysed to answer the Key Evaluation Questions.

[Read More](#)

Sub-steps:

- Consider important elements of what is being evaluated
- Consider important aspects of the evaluation
- Consider the implications of the resources available and specific constraints

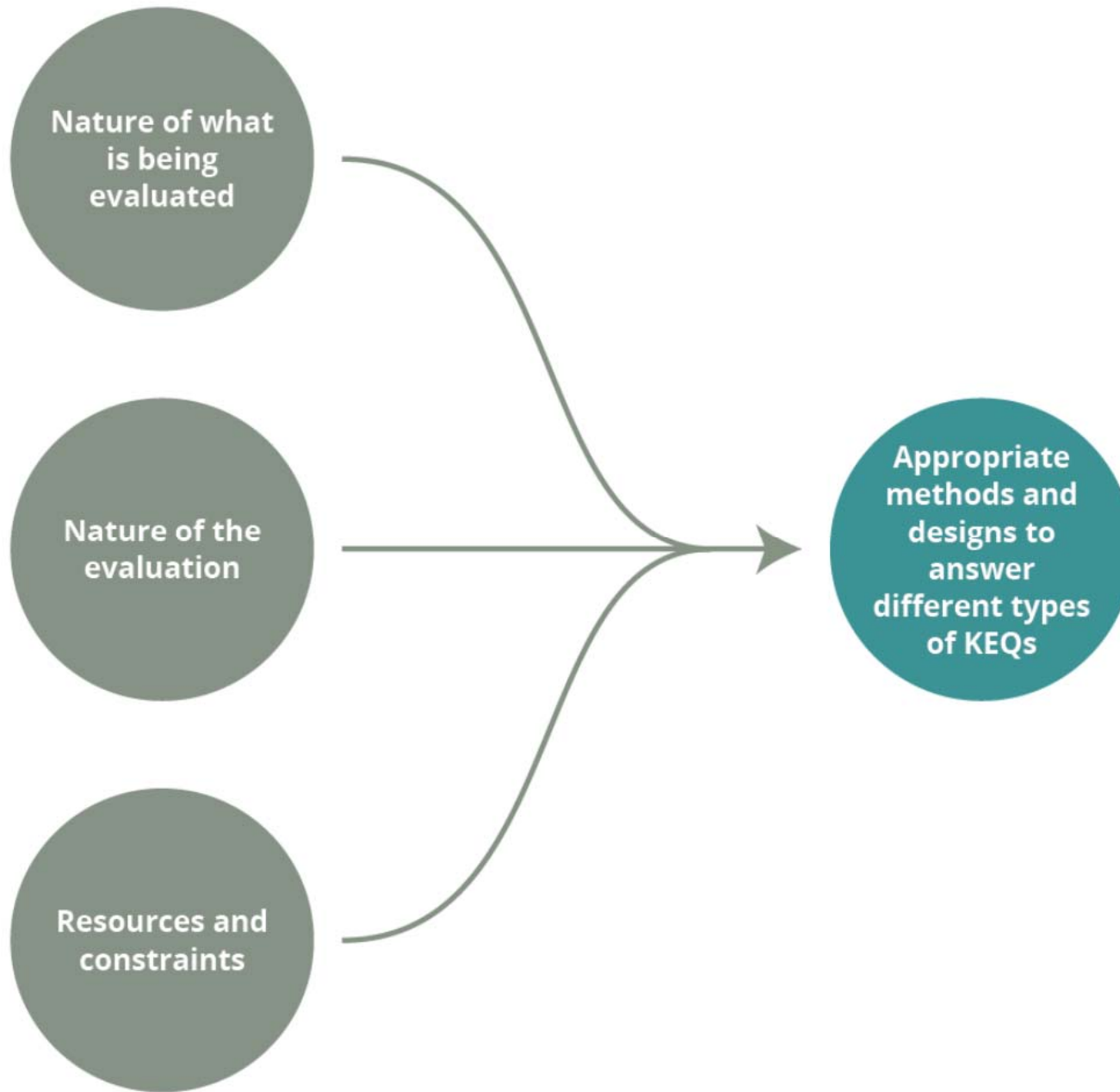
If an EVALUATOR will develop the evaluation design

- Engage a competent evaluation expert (internal, external or a combination) ([See advice](#)).
- Work with the expert(s) to ensure they understand [important factors that should be taken into account in the evaluation design](#)
- The design should provide details of how data will be collected analysed. It is often useful to do this in the form of an Evaluation Matrix which shows how each Key Evaluation Question will be answered.

If YOU (as manager) will develop the evaluation design

- Understand [important factors that should be taken into account in the evaluation design](#)
- Develop an evaluation design that addresses these important factors.
- Summarise the design in the form of an Evaluation Matrix which shows how each Key Evaluation Question will be answered.

Subsequently, arrange for a **technical review of the evaluation design** and arrange for a **review of the design by the evaluation management structure** (e.g., steering committee). Ideally this will include representation from primary intended users.



2. Consider important aspects of the evaluation

Evaluations are designed to answer the [Key Evaluation Questions](#). Different types of questions need different methods and designs to answer them. In evaluations there are four main types of questions:

Descriptive questions ask about what has happened or how things are – for example:

- What were the resources used by the program directly and indirectly?
- What activities occurred?
- What changes were observed in conditions or in the participants?

Causal questions ask about what has contributed to changes that have been observed – for example:

- What produced the outcomes and impacts?
- What was the contribution of the program to producing the changes that were observed?
- What other factors or programs contributed to the observed changes?

Evaluative questions ask about whether an intervention can be considered a success, an improvement or the best option and require a combination of explicit values as well as evidence – for example:

- In what ways and for whom was the program successful?
- Did the program provide Value for Money, taking into account all the costs incurred (not only the direct funding) and any negative outcomes.

Action questions ask about what should be done to respond to evaluation findings – for example:

- What changes should be made to address problems that have been identified?
- What should be retained or added to reinforce existing strengths?
- Should the program be refunded?

Consider important elements of what is being evaluated

Also available in: [Français](#)

What is being evaluated makes a difference to how it should be evaluated. It is helpful to identify particular aspects of what is being evaluated and check that these have been addressed in the evaluation design.

Firstly, check the implications of the stage of development of the project or program that is being evaluated. Is it still being planned? Is it part-way through implementation? Or is it near the end – or has it in fact already ended?

Stage of development?	Consequence	Possible implication for the evaluation design
Not yet started		<i>Possible to gather baseline data as a point of comparison and also to establish comparison groups or control groups from the beginning</i>
	Can set up data collection from the beginning of implementation	<i>Opportunity to build some data collection into administrative systems to reduce costs and increase coverage</i>
	Period of data collection will be long	<i>Need to develop robust data collection systems including quality control and storage</i>

Step 6

Manage development of the evaluation work plan including logistics

Oversee or engage in the development of a work plan that sets out the specific activities to implement the evaluation. This should include identification of the reporting requirements and a dissemination plan.

[Read More](#)

Step 7 Manage implementation of the evaluation

Oversee or engage in specific evaluation activities to collect and analyse data as set out in the evaluation work plan (including revising it as needed) and keeping the evaluation management group(s) informed and involved.

[Read More](#)

Step 8 Guide production of quality report(s)

The evaluation reports should include relevant and comprehensive information structured in a manner that facilitates its use but also provide transparency in terms of the methods used and the evidence obtained to substantiate the conclusions and recommendations.

[Read More](#)

Step 9 Disseminate reports and support use of evaluation

Make evaluation reports available and engage with primary intended users to make the results accessible. Archive the evaluation report and data (if appropriate). Use effective strategies to support use of the findings.

[Read More](#)

Sub-steps:

- Make evaluation reports available and engage with primary intended users to make the results accessible
- Archive the evaluation report and data (if appropriate)
- Support the use of evaluation findings

Further information & Resources

- [Develop reporting media](#) -provides further guidance, resources and examples to written and other types of reporting media including creative options (such as infographics, reporting in pictures).

Next: **Step 9 (Sub-step). Archive the evaluation report and data (if appropriate)**

Back: **Step 9. Disseminate reports and support use of evaluation**

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9. Disseminate reports and support use of evaluation

- **Make evaluation reports available and engage with primary intended users to make the results accessible**

[Click here to view full menu](#)

Data visualisation



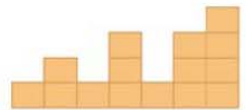
BetterEvaluation

Sharing information to improve evaluation



Bar Chart

Illustrating the main features of the distribution of a data set in a clear way.



Block Histogram

Presenting a frequency distribution of quantitative data in a graphical way.



Bubble Chart

Providing a way to communicate complicated data sets quickly and easily.

How you can contribute

- ▶ Trial in real evaluations
- ▶ Provide feedback to improve utility of guidance
- ▶ Provide more examples
- ▶ Provide more resources
- ▶ Support translation into other languages



Program Managers' Guide to Evaluation

www.betterevaluation.org/managers-guide

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