**Terms of Reference for Evaluation [[1]](#footnote-1)**

# **Evaluation Summary**

|  |  |
| --- | --- |
| **Project ID and Program/Project Name** |  |
| **Name of Partner Organisation/s** |  |
| **Project start and end dates; phase of project if applicable** |  |
| **Evaluation Purpose** | *Please insert main purpose here in one brief statement:*  *eg: Review of achievements (so far) for further steering and improvement of project;*  *OR: Assessment of overall results of project for accountability purpose, donor reporting, OR organisational learning, OR planning of next phase; etc.* |
| **Evaluation Type** | *(e.g. ex-ante, mid-term, final evaluation, ex-post, thematic, country plan evaluation)* |
| **Contracting organisation/contact person** | *For non-LCDF projects the contracting organisation is the partner organisation; otherwise it is a CBM entity such as CO or RH* |
| **Evaluation Team members** (if known) | *(e.g. team of x number of external consultants OR mixed team of CBM staff and external consultants)* |
| **Primary Methodology** | *(e.g. Mixed Methods, incl. quantitative and qualitative methods; theory-based evaluation; participatory; inclusive; appreciative inquiry etc.)* |
| **Proposed Evaluation Start and End Dates** |  |
| **Anticipated Evaluation Report Release Date** |  |
| **Recipient of Final Evaluation Report** | *(e.g. Partner Organisation, local Government, National Government, CBM etc.)* |

1. **Project Description** (max 1 page)

## *Objectives (overall and specific objectives), time frame/phase, location, target population/stakeholders/ partners, summarised completed/ongoing activities and budget – if available provide a short summary or an existing summary sheet of the project.*

## *If any previous assessment, review, baseline or feasibility study or evaluation has been carried out, include a summary of the main results and actions that followed the study recommendations.*

## **Evaluation Objective and Intended Use**

*Clearly define the* ***objective of the evaluation*** *– why is the evaluation conducted and why at this point in time; what is expected to gain from the evaluation, etc.*

*The objective depends on the utilisation of this specific evaluation – adjusting remaining project implementation; improvement towards achieving project objectives and targets; assessing the results of the project/programme at its completion; communication and learning; creation of good practices; accountability purposes.*

*Sometimes a final evaluation can also be used instead of a feasibility study for a project that is scheduled for a next LCDF funded phase.*

1. **Scope of the evaluation**

*Describe what shall be covered by the evaluation), such as the time period, types of interventions, geographical coverage and target groups to be covered under this specific evaluation (this is* ***not*** *about the specific evaluation questions). Decide whether the evaluation shall cover all project locations/communities or whether the evaluation shall study in selected locations only or with a limited sample.*

## **Limitations**

*Are there any conditions or risks that might limit the scope of the evaluation, such as funds available, time, logistic, politics, security, or availability of documentation or data?*

*Is a (semi-) remote study necessary due to safety/health and security or other reasons? Will it be possible to have direct stakeholder interaction or will remote mechanisms and virtual meetings need to be used?*

1. **Target audience and learning**

*Consider the usefulness of the evaluation for stakeholders, incl. partners, target groups and donors. Describe how the results will be used and who will receive the full report or summary of the report. Include the need to have reports that are easy to understand and accessible.*

*Describe the role of the evaluation team to facilitate learning. Who shall learn from and use the results of the study?*

## **Evaluation Questions**

*The questions shall be based on the* [***OECD DAC***](https://www.oecd.org/dac/evaluation/daccriteriaforevaluatingdevelopmentassistance.htm) ***evaluation criteria of relevance, coherence, effectiveness, efficiency, impact and sustainability.*** *NOTE: Coherence is a recent addition by OECD DAC and needs to be included.*

*There is no need to assess all 6 criteria equally detailed; decide which are the most important criteria to cover your information and learning needs and let the evaluation focus on those aspects.*

*In addition, all evaluations assess aspects around the* ***CBM Programme Quality Principles*** *(PQF document to be provided to consultants after contract signature), namely*

* *Equality and Inclusion*
* *Gender Equality*
* *Safeguarding (children and vulnerable adults)*
* *Advocacy*
* *Accessibility and Universal Design.*

*Develop guiding questions that refer directly to planned achievements (outcomes/objectives) as in the project plan, logframe or theory of change. You need to clearly know the project’s/programme’s objectives, expected results, activities and target groups in order to complete the section below. It is important to formulate the questions with a focus on disability inclusion.*

1. **RELEVANCE - Is the project/programme doing/ has it been doing the right things?**

Was the project designed in ways that respond to the needs and priorities of all participants[[2]](#footnote-2) (irrespective of gender, age, disability status)? To what extent does/did the project design reflect the rights of persons with disabilities and other marginalised groups and include feedback from a diverse range of local stakeholders?

In Humanitarian Context: **Appropriateness** of the humanitarian activities to local needs, increasing ownership, accountability and cost-effectiveness.

1. **COHERENCE - How well does/did the project/programme fit in the broader national and international context?**

To what extent are the project’s design, delivery and results coherent with international laws and commitments to disability rights, gender equality and rights, including the CRPD[[3]](#footnote-3), CEDAW[[4]](#footnote-4), and the 2030 Agenda? To what extent does the intervention support national legislation and initiatives that aim to improve equality and human rights?

In Humanitarian contexts: Assess security, developmental, trade and military policies as well as humanitarian policies, to ensure that there is consistency and that all policies take into account humanitarian and human-rights considerations.

1. **EFFECTIVENESS - Is the project/programme achieving its objectives?**

Did the project achieve its objectives and expected results in ways that contribute to inclusion and equality across groups, such as persons with and without disabilities or women/girls and men/boys? Were different approaches used to reach the different groups?

Was the theory of change and results framework informed by analysis of inclusion, gender equality, political economy analysis and human rights?

Was the intervention adjusted to address any concerns and maximise effectiveness?

1. **EFFICIENCY - How well have resources been planned and used?** The extent to which the intervention delivers, or is likely to deliver, results in an economic and timely way.

Were different resources allocated in ways that considered inclusion and equality? Was

differential resource allocation appropriate?

Do the investment costs per person targeted meet the differentiated needs of different people (gender, age, disability status)?

1. **IMPACT - What difference did the project make?** The extent to which the intervention has generated or is expected to generate significant positive or negative, intended or unintended, higher-level effects.

Were there equal impacts for different groups of people? If so, why did these differential impacts occur? How did norms related to disability or gender and barriers within the wider political, economic, religious, legislative and socio-cultural environment impact outcomes?

To what extent have impacts contributed to equal power relations between different groups of people and to changing of social norms and systems?

1. **SUSTAINABILITY - Will the benefits last?** The extent to which the net benefits of the intervention continue or are likely to continue. Includes an examination of the financial, economic, social, environmental and institutional capacities of the systems needed to sustain net benefits over time.

Did the intervention contribute to greater inclusion and equality within wider legal, political, economic and social systems? Did it result in enduring changes to social norms that are harmful to any specific group of people? Will the achievements in inclusion and equality persist after the conclusion of the intervention? Have processes contributed to sustaining these benefits? Have mechanisms been set up to support the achievement of inclusion and equality in the longer term?

In Humanitarian Context: **Connectedness,** i.e. the need to ensure that activities of a short-term emergency nature are carried out in a context that takes longer-term and interconnected problems into account.

1. **Safeguarding of children and vulnerable adults**

The extent to which safeguarding aspects have been considered and how the respective mechanisms been established, used and adhered to.

1. **Equality and inclusion/gender equality**

The extent to which women and men, persons with and without disabilities were actively involved during all steps in the project cycle and how the groups benefited from the intervention. Output and outcome data shall be disaggregated according to gender, age (adults/children) and disability status. For the collection of data on disability, the use of the Washington Group Short Set of Questions is mandatory. Consultants need to be guided on the Washington Group Questions and their application.

In Humanitarian Contexts: **Coverage:** The need to reach major population groups facing life-threatening suffering wherever they are.

Please consider adding some questions around the “**Humanitarian Imperative**” as outlined in the Programme Quality Framework

## **Methodology**

*Explain how the evaluation could be conducted within the given circumstances (geographical, political, time frame). No matter what methods are being used during the evaluation, there are mandatory mechanisms that must be adhered to during the entire process:*

* *Participatory and inclusive*
* *Safeguarding of children and adults at risk*
* *Data Disaggregation (gender/age/disability)*
* *Data Security and privacy (informed consent)*

*Indicate how details of the methodology will be decided between the evaluation team leader, the implementing organisation and CBM. Indicate when you expect the consultant to provide detailed methodology and whether you require this in a written Inception Report.*

*Define together with the partner who will be the persons and groups that need to be interviewed or consulted during the evaluation. You could use the* ***stakeholder table in Appendix A*** *to provide more detail.*

*Specify how the evaluation shall involve female and male adults and children with disabilities and their families that are affected by the project, and necessary accommodations in the methodology (sign language, accessible venues, additional time).*

*Specify how project participants shall be included in the data collection and analysis, in the formulation of recommendations, and how will the findings and recommendations be fed back to them? Detail specific meetings, discussions, workshops, presentations.*

## **Management Responsibilities and Evaluation Team**

**Commissioning responsibility**

*Explain who (office/ name) is responsible for commissioning/contracting the evaluation, their role and who needs to approve methodology, final reports etc. If the evaluation is commissioned and managed by the partner organisation, CBM shall be involved in the finalisation of the TOR, selection of the consultants and input/approval of the final report.*

**Management Responsibility and Logistics**

*Who will be provide management for the evaluation process (CBM or partner or joint efforts)? Explain who is responsible for getting what done - organizing transport, accommodation, booking interviews and organizing venues, flights (CBM, partner or consultants?). Who is responsible for ensuring disability inclusive venues/ translators?*

**Evaluation Team**

*Clarify what skills, academic and professional background will be needed on the team. Describe necessary knowledge of Disability Inclusion and other technical/medical knowledge depending on the project and evaluation focus. Include necessary language and soft skills etc.*

*Ideally teams need to be made up inclusive of men and women with and without disabilities. In line with best practice for disability inclusive development, a Disabled People’s Organisation representative or person with a disability should participate in the evaluation as an evaluation team member or as a specific evaluation advisory group.*

## **Deliverables**

*Specify the deliverables of the consultants, incl. reports and supporting documents, delivery time and language. Specify how the results will be shared with all stakeholders incl. project beneficiaries.*

*The report should be presented in the standard evaluation report format of CBM with at least a summary in English.*

* *Inception Report due by:*
* *Draft Report due by:*
* *Finalised Report due by:*

*List other expected outputs, e.g. presentation, workshop, draft of new log frame, draft of new Multi Year Plan, facilitation of forum, etc.*

*All background material shall be delivered, incl. questionnaires, surveys etc. in the form of an Annex.*

## **Evaluation Schedule**

*Insert expected time frame for the entire evaluation, including time for preparation and in-country briefings. You may consider a planning meeting (online) that is scheduled weeks before the field work, durign which methodology and sampling is discussed.*

*(Note: Calculating number of days required will allow you to estimate the rough cost based on daily professional and logistic fees. For preparation of evaluation budget pls consult this document.)*

|  |  |  |  |
| --- | --- | --- | --- |
| **Task** | **Location** | **Number of Days** | **Expected Dates** |
| Briefing | Online/CBM office |  |  |
| Desk Study | Consultants’ desk |  |  |
| Field Phase, Project Visit or remote data collection phase |  |  |  |
| De-briefing with initial findings | Online/partner office |  |  |
| Analysis and draft report | Consultants’ desk |  |  |
| Finalising report | Consultants’ desk |  |  |
| (Option of wrap-up workshop with stakeholders) | Online/partner or CBM office |  |  |
| **TOTAL** |  |  |  |

## **Payment Mode**

*Give an indication on the management of payments. Detail payment milestones according to delivery of specific products (batches of payment – inception, mid-term, final). There is no need to write the total amount available for this evaluation in the TOR. You need to refer to country specific contractor agreement* *if you engage external evaluators.*

*Please detail what costs will be covered by whom, such as:*

* *Logistic costs: airfares, accommodation, visa fee, local transport (those costs will be reimbursed upon receipt of proper invoices).*
* *Make sure that VAT is added to fees either by the consultant or by your office.*

1. **Applications**

**Please insert here:**

*Expressions of Interest shall be submitted by (insert date here) to (insert email or other address here) and shall include:*

* *Brief description of consultancy firm/consultant/team*
* *Detailed CVs of each suggested team member*
* *Understanding of this TOR and suggested methodology*
* *Availability of team and suggested schedule*
* *Financial proposal*

*Only complete applications will be considered. The contractor may ask for references and/or examples of previous work and reports during the recruitment process. The contractor reserves the right to terminate the contract in case the suggested and agreed upon team members are unavailable at the start of the evaluation and no adequate replacement can be provided.*

*Each team member, incl. interpreters, enumerators etc need to fully comply with and sign CBM’s or the partner organisation’s Code of Conduct and Child Safeguarding Policy as well as commitment to data security and privacy.*

1. **Documents**

*List documents that will be provided to the evaluation team such as project description, logical framework or theory of change documents, most recent reports, recent financial report, any previous assessment, review, evaluation report (as applicable).*

*Note that those documents will be made available to the consultant after signature of contract.*

*If you find it useful, pls include the below stakeholder analysis matrix and the outline/template of the evaluation report.*

## **Appendix 1: Stakeholder Analysis for Evaluation.**

You could use this matrix to list stakeholders involved in the project and determine whether and how they could contribute to the evaluation, through interviews, surveys and meetings.

Please list **all** current and potential external and internal stakeholders including beneficiaries that contribute or influence the success of the proposed project(s) being evaluated.

|  |  |  |  |
| --- | --- | --- | --- |
| **Stakeholders** | **What is their interest and contribution in the proposed project?** | **What is their power and influence in the project** (1-5 rating, 1=low, 5=high) | **Will the project involve / these stakeholders in the evaluation? How?** |
| **Primary Stakeholders** | | | |
| e.g., Women and men with disabilities |  |  |  |
| e.g., Girls and boys with disabilities |  |  |  |
| **Secondary stakeholders** | | | |
| e.g., Mothers, fathers, care givers |  |  |  |
| e.g., Volunteers |  |  |  |
| e.g., Local Government |  |  |  |
| e.g., Board of partner organisation |  |  |  |
| e.g., Central Government |  |  |  |
| e.g., Community |  |  |  |
| e.g., NGOs |  |  |  |
| e.g., Project staff |  |  |  |
| e.g., CBM staff |  |  |  |

1. Evaluation ToR, Final Report and Management Response to be uploaded in ProMIS Project page Document library. [↑](#footnote-ref-1)
2. Participants are understood as those persons directly addressed and involved in the project/programme. The objective of a project/programmes is formulated to create positive changes in the lives of those participants. [↑](#footnote-ref-2)
3. CRPD = Convention on the Rights of Persons with Disabilities. [↑](#footnote-ref-3)
4. CEDAW = Convention on the Elimination of All Forms of Discrimination Against Women [↑](#footnote-ref-4)