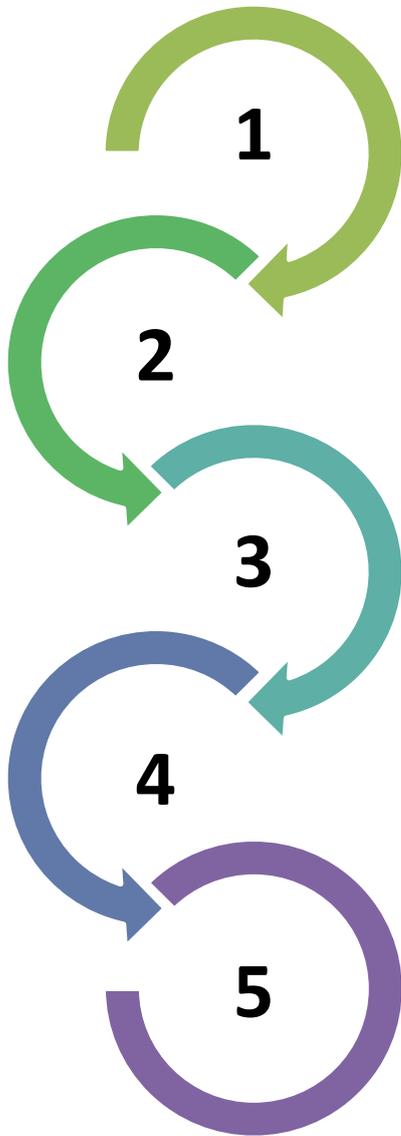


RESEARCH AND EVALUATION TERMS OF REFERENCE

Research and evaluation projects in NGOs often involve a team. Whether you are working with partners, consultants or internal staff, having a clear plan from the beginning can help avoid problems later. Here are five key areas to consider when drawing up a terms of reference (ToR) for a research or evaluation project.



1. QUESTIONS AND OBJECTIVES

You'll need to identify a strong question and sub-questions to guide your project – what do you want to know at the end that you don't know now? Setting clear objectives helps clarify what you want to achieve through the activities during the project, and what data you need to collect.

2. AUDIENCE, USE AND OUTPUTS

Who do you want to read and use your research? What kind of outputs do you need to reach them, and to meet other requirements – perhaps from a funder? Do you just want a report? How long? A summary in an additional language? Would a podcast or interview be useful, or a presentation or infographic?

3. ETHICS AND DATA MANAGEMENT

Research and evaluation must reflect the core values of the organisation carrying them out. It's important to consider ethics in your plan. This includes addressing power relations between different people and organisations (including yourself), identifying vulnerable people, and planning to store and manage data legally and securely. Establish who owns the data collected by consultants and partners.

4. METHODS AND APPROACH

There are so many different methods available – participatory approaches, surveys, focus groups, observation, photography. What will help you answer your question? Will you take a mixed-methods approach? How will you analyse your data – who will be involved, and which methods will you use?

5. TIMELINE, BUDGET AND MANAGEMENT

Having a solid, realistic timetable – which includes time for planning, analysis, drafting and communicating – will help things run smoothly. You also need to work out a budget, and make sure everyone knows their roles and responsibilities.

Why does it matter?

Drawing up and agreeing a plan or ToR gives you time and structure to think through and agree the essentials of your project. It can be useful to start with an open discussion to generate lots of ideas and plans first. Then drawing up the ToR can be part of focusing in and agreeing what you are trying to achieve and how. Your ToR might need to be altered if new partners come on board, or to adapt to unexpected challenges – and it can be a moment to reflect. When commissioning research consultants, the ToR will also form an important part of the contract.