

Guide for Terms of Reference Template

1. Introduction and Description of the Intervention

(1.1) Purpose, objectives and intended outcomes

[Set out the purpose, the main objectives and the intended outcomes of the policy intervention to be evaluated in order to provide all the contextual elements to the potential contractors.]

(1.2) Rationale for the evaluation

[Explain why the intervention was chosen for evaluation, what change the intervention intended to induce on the outcome(s) of interest and how the results of the required evaluation may be used by the MAs.]

(1.3) Description of the context:

[Describe the context in which the intervention was implemented. Give details about the institutional setting, the environmental and background characteristics and on simultaneous interventions eventually occurred]

(1.4) Roles and responsibility of the main stakeholders involved:

[Describe the roles and responsibilities of the main stakeholders involved in the design and the implementation of the program.]

(1.5) Information on the program:

[Give additional useful information on the program itself if available. For example on the expected aims, the implementation phases and/or the budget allocated]

(1.6) Available related studies, documents and evaluations:

[Give references of the existing related studies, documents or evaluations previously conducted on the program.]

(1.7) Eligibility criteria

[Specify the eligibility criteria for participants to apply the intervention.]

(1.8) Criteria for the selection of participants among the applicants

[Describe the criteria adopted for the selection of participants among the applicants.]

(1.9) Other potential factors affecting the outcomes

[Discuss if other factors in addition to program participation are likely to affect the outcome of interest.]

2. Scopes and Objectives of the Evaluation

(2.1) Evaluation questions

[The statement of the specific objectives for the evaluation is crucial to define the main questions that the evaluators might be required to answer. It is crucial in this section to define the specific evaluation questions identified and why they are closely related to each of the program's objectives.]

(2.2) Theory of change

[Indicate the underlying "theory of change" that in a causal chain perspective links the policy intervention under evaluation with the expected changes in the outcomes of interest.]

(2.3) Prioritisation of the assigned tasks

[Explain clearly how the assigned evaluation tasks should be prioritized among the team different members along with the general assessment process.]

3. Data Availability

(3.1) Data Sources

[Indicate the availability of the appropriate data sources (administrative or survey), state which data will you made available to the contractor and by when and/or precise the time required by the contractor to have access to them.]

(3.2) Data Quality

[Describe the overall level of quality of the available sources, the data representativeness, the main variables contained distinguishing among outcome(s), treatment and control variables]

(3.3) Data Protection

[In case confidentiality of data is explicitly required due to the nature of the data sources involved, specify in details the ethical requirements and the technical and professional standards to be guaranteed by the evaluators (e.g. anonymization procedures, the need of a data protection manager officer, etc...)]

4. Methodological Approaches

(4.1) Range of counterfactual methodologies

[Specify the category of counterfactual methods to be used in the evaluation in order to guarantee the adoption of an appropriate methodology.]

5. Selection and Award Criteria

(5.1) Minimum requirements on

[Set here the criteria for the selection of the evaluator team among all potential candidates. Be clear and precise indicating the requirements for each of the following dimensions.]

- the size and experience profile of the evaluation team

[e.g. number of years of experience, dimension of the team, mix of technical and scientific skills required]

- the qualifications of the principal investigator

[e.g. academic degree and field of specialization required, years of experience, technical or research expertise]

- the necessary human and technical resources

[e.g. hardware and/or software requirements, number of people to be involved according to their seniority and experience]

- the distribution of responsibilities

[e.g. distribution of tasks and responsibilities within the evaluation team including duties related with the quality control arrangements required]

6. List of Deliverables and Time Schedule

(6.1) List of deliverables with deadlines:

[Specify what are the expected deliverables, their exact timeline and the corresponding amount payed.]

- Inception report
- Intermediate report
- Final report