



INTERact

Sharing Expertise

How to develop a Terms of Reference for evaluation?

Evaluation of European Territorial Cooperation Programmes

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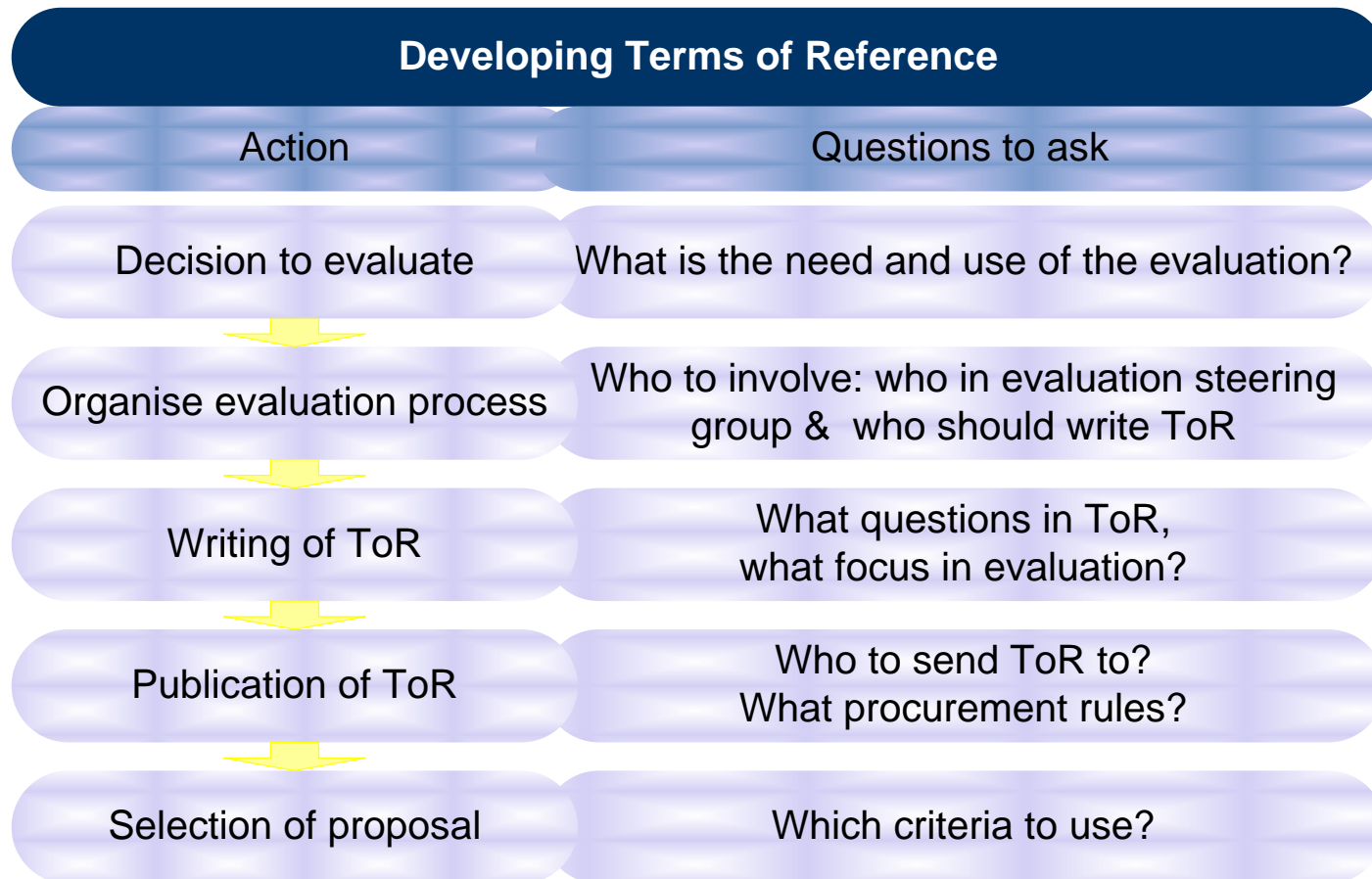


Topics to discuss

- 1. Decision to evaluate**
- 2. Organise evaluation process**
- 3. Writing ToR**
- 4. Publication of ToR**
- 5. Select winning proposal**



How to develop ToR?





How to develop a good ToR? Step 1

1. Decision to evaluate

- Reason to evaluate?
- Budget available?
- Internal/external?
- How to use results?



How to develop a good ToR? Step 2

2. Organise evaluation process

- Who to involve?
- Evaluation steering group?
- Who writes ToR?
- Time plan?



Step 3: Writing ToR. Suggested Table of contents

Example table of contents for ToR

1

Objective & scope

2

Users & stakeholders

3

Evaluation questions

4

Available information

5

Methodology

6

Time schedule & reporting

7

Indicative budget

8

Qualification of evaluation team



How to develop a good ToR? Step 4

4. Publication of ToR

- **Open procedure**
- **Restricted procedure**
- **Negotiated procedure**
- **Framework contract**



How to develop a good ToR? Step 5

5. Select winning proposal

- What criteria?
- Who assesses?
- What procedure?



Assessment grid tool

Topic	Maximum points	Initial assessment	Revised assessment
I Organisation and methodology	E.g. 60	[Total score for I]	[Total score for II]
Rationale (understanding of and reflection on the ToR, risks & assumptions)	e.g. 20	[score]	[score]
Strategy (approach, activities, timetable, milestones, logical framework)	e.g. 40	[score]	[score]
II Evaluation team	e.g. 40	[Total score for II]	[Total score for II]
Experience (description of company / consortium, division of tasks). E.g. (a) experience with INTERREG & ERDF evaluations, (b) experience with the programme area, (c) experience with Territorial Cooperation.	e.g. 20	[score]	[score]
Experts (CVs, division of tasks)	e.g. 20	[score]	[score]
III Qualitative assessment			
Strengths		[text]	[text]
Weaknesses		[text]	[text]
Total	100	[score]	[score]

How to develop a good ToR? Quality checklist



Score*	Quality check	Programme*	Evaluator*
(1-5)	Start-up/Inception phase		
	The purpose of the evaluation is clear		
	Programme is clear enough to facilitate evaluation	✓	
	The ToR answer clear needs and have been developed with relevant stakeholders	✓	
	The tender procedure was transparent, with clear criteria	✓	
	A clear contract has been agreed between the programme and the evaluator	✓	(✓)**
	It is clear what the envisaged use of the evaluation will be	✓	
	The proposal/inception report for the evaluation enables appropriate, good quality results		✓
	The inception phase enables a realistic approach to the evaluation	(✓)**	✓
	Implementation phase		
	Reliable data and information were available, presented and used	(✓)**	✓
	Relevant stakeholders were involved to obtain different points of view	(✓)**	✓
	A sound analysis has been made, the method is included in the report		✓
	A clear report has been written, answering the questions set forth in the ToR		✓
	The conclusions are impartial, unbiased and the recommendations are clear and useful		✓
	The evaluation was well managed by programme/Evaluation Steering Group & evaluator	✓	✓
	The time schedule was followed	✓	✓
Follow-up phase			
The evaluation report has been disseminated to decision-makers and stakeholders	✓		
Based on the evaluation report follow-up actions have been agreed	✓		



What to do with the results?

Follow-up and dissemination - recommendations!

- All reports presented to the MC.
- All recommendations accompanied by a response of MA.
- MC supervises the implementation.
- Evaluation reports should be published.

