

## **Guidance Note: Contracting Country Evaluation Teams (Draft v3.1)**

**Prepared by the Core Evaluation Team, November 2009**

This Guidance is in response to requests from Regional Workshops for a more detailed brief on the specification, selection and contracting of the Country Evaluation Team. It reflects the anticipated scope of work to be undertaken by a Country Evaluation Team as given in the (draft) Generic ToR and discussed at the Regional Workshops. In this way it is *illustrative* of the requirements of a Country. It offers a basis for a National Reference Group to discuss and finalise the selection criteria for the Evaluation Team and for the National Evaluation Coordinator to expedite the procurement and contracting process.

This illustrative Team specification has been prepared on the basis of a set of key requirements/ parameters for conducting country evaluations:

- A complex and politically sensitive evaluation requiring an effective team of people with the ability to work in a collegiate way using evidence in a joint analysis which accounts for different perspectives.
- An open and engaging process for an independent evaluation that national stakeholders have confidence in and readily contribute to.
- A comprehensive evaluation – both breadth and depth – requiring attention to detail, background research, focused enquiry and delivery to reporting deadlines.
- Requires a four month (min) to six month (max) period from start through to Draft Report; factoring in adequate time for sharing and discussion with the Country Evaluation Governance and Management structures at key milestones.
- Works within an expected budget for the inputs of the Evaluation Team of around 80.000 Euros (covering both fees & reimbursables).

### **A) Evaluation Team Specification (Recommended)**

#### **Team composition**

- A team of four consultants (men and women, all with a minimum masters level qualification and fluency in the language of government) supported by one full time Research Assistant
- The team of four to include one experienced national Team Leader, two national consultants (one senior & one mid career) complemented by one experienced international or regional consultant.

#### **Team qualities (essential)**

- Experience in conducting strategic level (programmatic and/ or thematic) outcome & impact evaluations which assess 'contribution'.

- Broad and in-depth knowledge of aid practice and related institutional arrangements and relationships within/ relevant to the country (National Government, Donors & civil society).
- Familiarity with the principles of the Paris Declaration and some engagement in national and international policy efforts to improve aid effectiveness.
- Wider and historical – beyond aid – view of development processes in the country/ region.
- Excellent communication skills (written and oral)
- Multi-disciplinary professional backgrounds including; (i) management/ organisational behaviour, (ii) political economy/ economics, (iii) sectoral (social/ non-social) programmes, (iv) gender expertise, and (v) government structures and administration.

#### **Team qualities (desirable)**

- Some prior experience of working together successfully on evaluations.
- Experience with mixed methods evaluations.
- Experience with conducting Joint evaluations
- Specialist knowledge on social exclusion.
- Experience in the monitoring and reporting of development results (including use of disaggregated data) through application of a ‘results chain’ approach.

#### **Team independence**

- Avoid selection of consultants with conflicts of interest or who may be partial, as this carries the risk of excessive bias into the evaluation. What constitutes a ‘conflict of interest’ or lack of impartiality will have to be judged within each country context as implementation of the Paris Declaration covers all aspects of aid management and has taken different paths. The important aspect is to aim for an Evaluation Team that can operate with integrity and will be recognised as such by the wider group of stakeholders.

#### **Indicative Team inputs** (will vary depending on negotiated fees reflecting market rates)

- Team Leader (National) – 50 days
- National Consultant (senior) – 30 days
- National Consultant (mid career) – 40 days
- International/ Regional consultant – 30 days
- Research Assistant – 100 days

**B) A Possible Process for Team Selection** (indicative steps and weighting)

- i) Place open bid in a local press advertisement calling for institutions/ organisations ('firms') to express interest by presenting their credentials on management of strategic level evaluations and the relevant experience of the proposed Team leader candidate or directly issue invitation to pre-qualified firms (proceed direct to iii).
- ii) Shortlist a maximum of up to four firms on basis of; (a) management of strategic level evaluations (50% total marks) and (b) the relevant experience of the proposed Team leader candidate (50% total marks).
- iii) Assess the short bidding documents of shortlisted/ invited firms on the following basis;

Technical Proposal (90 out of total of 100 marks)

a) Quality of the presented team (50 marks) – of which essential qualities (40 marks), desirable qualities (10 marks)

b) Proposed Workplan of the Team (20 marks) – proposed use of pre-set budget resources made available to the team given the task outlined in the Country Specific ToR; description of team member roles, proposed sequencing of inputs etc.

c) Proposed management arrangements for the Team and its work by the firm (20 marks – and with a minimum score of 10 marks) – ability to conduct surveys and manage sources of data, quality including timely delivery of previous work, responsiveness to clients.

Financial Proposal (10 out of total of 100 marks)

d) Price comparison across bids; fee rates for the different experience levels of consultant proposed within the evaluation team.