EVALUATION HANDBOOK

A Step by Step Guide to Commissioning Evaluation at The Foundation

The **Fred Hollows** Foundation

INTRODUCTION

The Fred Hollows Foundation (The Foundation) is committed to ensuring the programs it supports are of the highest quality and delivering sustainable impacts for the people they aim to benefit. Evaluation is a core component of The Foundation's program management cycle, and aims to contribute to a culture of learning and continuous improvement; generate robust information to inform program design and decision-making; and ensure accountability to beneficiaries, partners and donors. The Foundation is also committed to transparency and the sharing of evaluation findings with members of the wider eye health sector and other development actors.

This suite of evaluation guidelines and templates is designed to provide guidance to all staff at The Foundation who commission, manage, participate in, review, respond to and disseminate findings of evaluations. This handbook should be read in conjunction with The Foundation's Evaluation Policy. Country programs should also consider any relevant country or regional level policies and strategies that need to be taken into account when commissioning evaluations.

Please contact the Knowledge and Innovation Division M&E Helpdesk for further assistance.

SIX STEPS FOR COMMISSIONING EVALUATION

**Step 1:
Initial
planning**

Developing an evaluation outline.

Consult internally within The Foundation and agree who needs to be involved in planning, managing and providing technical support to the evaluation and their specific responsibilities.

Identify the relevant key stakeholders (internal and external) and the process for engaging them in the evaluation.

Develop a schedule and budget for the evaluation.

The following *Rough Guide* provides information about the key issues to consider when planning an evaluation.

1.1 *Rough Guide* to planning an evaluation

Before moving to the next step, you should complete the *Evaluation summary template,* which provides an overview of the evaluation, including the people involved, key dates and allocated budget.

1.2 Evaluation summary template

Step 2: Scoping

Developing an evaluation terms of reference.

An evaluation terms of reference (ToR) must be developed for all evaluations commissioned by The Foundation, and shared with the key stakeholders identified in Step 1. The ToR set out the expectations for the evaluation work to be undertaken and often form the basis of a contract with the evaluator/s.

Evaluation ToR must be reviewed by the delegated technical advisor, and recommended by them to the relevant Director or Associate Director for approval.

The following *Rough Guide* provides information to help you plan your evaluation, including a checklist to assist you in making sure you have covered the key items, and a template for developing an evaluation ToR. You should adapt the evaluation ToR template as required to meet the specific needs of your evaluation.

2.1 *Rough Guide* to scoping an evaluation

2.2 Evaluation scoping checklist

2.3 Evaluation terms of reference template

Step 3: Consultant recruitment

Recruiting an evaluation consultant or team.

Consult the following *Rough Guide* to assist you with selecting and contracting an evaluation consultant/evaluation team.

3.1 *Rough Guide* to recruiting an evaluation consultant/evaluation team

The expression of interest (EoI) template sets out the main elements to be included in a call for evaluation proposals and should be adapted as required for the

specific evaluation being undertaken. The evaluation ToR (step 2.3) should be linked to the EoI template.

3.2 Call for expression of interest template

Evaluation consultants/teams must be recruited in a fair and transparent manner, based on demonstrable appropriate skills and experience. Use the evaluation consultant shortlist template to assess applicants against the selection criteria set out in the evaluation ToR.

3.3 Evaluation consultant shortlist template

Once the successful evaluator/s have been selected, a contract should be developed using The Foundation's template for contract and service orders.

Step 4: Management

Manage the evaluation.

During the implementation of the evaluation, monitor completion of evaluation milestones, ensuring deliverables are completed in accordance with the evaluation schedule and contract agreement.

The following *Rough Guide* provides information to help you manage your evaluation, including developing an evaluation plan, a template for the plan which should be shared with the evaluator and a checklist to assist you in making sure the plan includes the key elements required to successfully deliver on the evaluation ToR.

4.1 *Rough Guide* to managing an evaluation

4.2 Evaluation plan quality checklist

4.3 Evaluation plan template

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**Step 5:
Reporting**

Review and approve the evaluation report.

Review the draft evaluation report and provide feedback to the evaluator/s.

The following template sets out the main elements to be included in an evaluation report and should be provided to the evaluator/s at the start of the evaluation process. The template can be adapted as required to meet the specific evaluation needs as set out in the ToR.

5.1 Evaluation report template

You can use the following checklist to assist you in reviewing and providing feedback on the evaluation report. This checklist should also be shared with the evaluator/s.

5.2 Evaluation report quality checklist

The final report must be approved by The Foundation. If there are any disagreements over the report content, these should be addressed by The Foundation in the management response to the evaluation (Step 6). A copy of all evaluation reports should be shared with The Foundation's Knowledge and Innovation Division.

**Step 6:
Learning and dissemination**

Reflect on, disseminate and respond to the evaluation findings.

Review the key evaluation findings, conclusions and recommendations and develop a plan for how to respond to them.

Disseminate the findings to the key stakeholders identified at the outset of the evaluation.

Implement the management response action plan.

Reflect on the evaluation process itself and document lessons learned.

The following *Rough Guide* provides information to assist you in reflecting on the evaluation findings, developing a plan to share them with others, and deciding how to respond to them.

6.1 *Rough Guide* to evaluation reflection, dissemination and management response

The following template should be used to document your evaluation reflection, dissemination and management response plan in relation to the evaluation findings and recommendations.

6.2 Evaluation reflection, dissemination and management response plan template

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