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| **EMBEDDING EVALUATION INTO EVERYDAY PRACTICE: TEMPLATES TO SUPPORT BETTER PRACTICE EVALUATION ACROSS THE COMMONWEALTH**The [Commonwealth Evaluation Toolkit](https://evaluation.gov.au/toolkit/commonwealth-evaluation-toolkit) is designed to support people to determine fit for purpose approaches to evaluate, measure, assess and report on the performance of Commonwealth programs and activities.There are many evaluation templates, tools and resources used across the Commonwealth, and in other jurisdictions, that may assist at different stages of an evaluation. While the set of templates available here are in line with better practice, the application and use of any one tool, template or example for the evaluation of a specific program or activity is ultimately at the discretion of the manager responsible for the successful delivery of results.The templates can be used to document how you plan to conduct an evaluation, or to strengthen routine performance measurement approaches. They are organised around the three stages typically involved in an evaluative activity:* Planning and budgeting (steps 1, 2 & 3)
* Measuring and assessing (steps 4, 5 & 6)
* Reporting and being accountable (steps 7 & 8)

More information about the stages and steps involved in an evaluative activity is available on the "[How to evaluate](https://evaluation.gov.au/toolkit/how-evaluate)" page in the Toolkit. The [tools and additional resources](https://evaluation.gov.au/toolkit/templates-tools-and-resources) available in the Toolkit also provide further guidance and examples on how to complete specific evaluative activities and tasks.[ REMEMBER TO DELETE THESE REFERENCE NOTES BEFORE FINALISING YOUR DOCUMENT ] |

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| **TEMPLATE 4: Evaluation Terms of Reference****Template Overview:** A Terms of Reference clearly articulates the scope of work to be undertaken and clarifies how decisions will be made. It can provide a good foundation to develop an evaluation plan (see Template 5). |
| **A comprehensive set of templates is available in the Commonwealth Evaluation Toolkit:** These [templates](https://www.finance.gov.au/government/managing-commonwealth-resources/planning-and-reporting/commonwealth-performance-framework/evaluation-commonwealth-rmg-130/templates-tools-and-additional-resources) can be used to help document how you plan to evaluate, measure, assess and report on the effectiveness, efficiency and/or appropriateness of government programs and activities. Use of these templates is NOT mandatory.* **Planning and budgeting**
	+ Template 1 | Theory of change (outcome mapping)
	+ Template 2 | Program logic
	+ Template 3 | Evaluation framework (program)
	+ Template 4 | Evaluation terms of reference
	+ Template 5 | Evaluation plan
	+ Template 6 | Identifying stakeholders and their roles in an evaluation
* **Measuring and assessing**
	+ Template 7 | Data evaluation matrix
	+ Template 8 | Data sharing agreement  (Sourced from ONDC: Data sharing agreement ONDC (datacommissioner.gov.au))
* **Reporting and being accountable**
	+ Template 9 | Evaluation report
	+ Template 10 | Evaluation action plan
	+ Template 11 | Evaluation closure report

[ REMEMBER TO DELETE THESE REFERENCE NOTES BEFORE FINALISING YOUR DOCUMENT ] |

The use of this tool or template is not mandatory. The appropriate application and use of any one tool, template or example for the evaluation of a specific program or activity is ultimately at the discretion of the manager responsible for the successful delivery of results

**TEMPLATE 4**

# [Insert program name] evaluation Terms of Reference[[1]](#footnote-1)

The [insert entity] will commission / undertake an evaluation of the [Insert program name]. The evaluation will be guided by the [program name] evaluation Governance Group (GG). It will be conducted by [insert the name of the external consultant / internal team], with additional support provided by the [insert policy team].

1. Background

[Insert name] program was established in [insert year]. The program’s objective is to [insert program objective].

Previous evaluations and reviews of the [Insert name] are listed in the table below [delete if there are no previous evaluations and reviews]

|  |  |  |
| --- | --- | --- |
| Date | Evaluator | Type |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

1. Authority for evaluation

[Insert name] program has been identified as an evaluation priority of [insert entity] and has an evaluation scheduled for [insert year/s].

1. Evaluation scope and timing

The evaluation will examine the performance of the [Insert name] program against the criteria of [appropriateness, effectiveness, efficiency, impact, integration, performance assessment, strategic policy alignment etc. – delete what is not appropriate].

The scope for this evaluation includes projects which commenced between [insert date] and [insert date]. This includes the program rounds [insert round] to [insert round] [delete if not applicable].

The evaluation will begin in [insert date] and be completed by [insert date]. The evaluation will include findings / recommendations / lessons learned.

1. Evaluation questions

The evaluation questions will be developed in accordance with the [Commonwealth Resource Management Framework](https://www.finance.gov.au/government/managing-commonwealth-resources). In assessing government activity against the Framework evidence must be used to demonstrate whether the activity is the most appropriate, effective and efficient way to achieve the Australian Government’s policy objectives and desired outcomes.

Please consult the [Evaluation Question Bank](https://www.finance.gov.au/sites/default/files/2021-11/tool_evaluation_question_bank.docx) for some ideas for evaluation questions that may be appropriate to the evaluation [this is not an exhaustive list].

1. Methods

The methods used in the [insert program name] evaluation will be developed by / based on advice from [insert evaluation area / external consultant].

A number of approaches will be used for this evaluation, including [add/remove as applicable]:

* Assessment of program logic, including review of assumptions
* Desktop research and literature review
* Analysis of previous reviews and evaluations
* Analysis of programme data held by the department
* Semi-structured interviews with a range of stakeholders
* Econometric analysis

The evaluation will draw on data from …

[Add further information on methodology as required]

1. Governance

The evaluation will be governed by the [Insert program name governance group (GG). The GG will be responsible for providing advice and guidance to the evaluators for the duration of the evaluation. The membership consists of [insert membership of GG] who will provide relevant/area specific advice and perspectives, including feedback about directions and deliverables.

Membership on the GG reflects the role rather than the individual. The Chair of the GG will sign off the Terms of Reference and will review the report’s findings and recommendations. The GG will comprise:

* [insert name] and position of each GG member
* It is anticipated the GG will provide some advice out-of-session and meet [insert number] times. The timing of these meetings will depend on availability and alignment with the final work schedule of the evaluators / consultants.

Some indicative times are:

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| Task | Date (approximate) |
| GG Meeting 1: Main topic: Discuss and endorse the evaluation’s Terms of Reference |  |
| GG Meeting 2: Main topic: Discuss and endorse the evaluation plan |  |
| GG Meeting 3: Main topic: Receive an update on preliminary findings from the evaluators |  |
| GG Meeting 4: Main topic: Review and provide feedback on the final evaluation report |  |
| ***Evaluation report finalised (out of session)*** |  |

The report will be signed off by the GG Chair.

Other issues to consider in the evaluation’s governance:

* Which Commonwealth entity/company governance bodies will consider / approve the final evaluation report?
* Who will commit the Commonwealth entity/company to implement the recommendations (if included in the evaluation report)? How will the implementation be tracked?
* Will the evaluation / parts of it be published?
* How will the Minister’s Office be briefed, by whom?
1. Resourcing

In addition to the GG’s time, the Commonwealth entity/company’s resourcing for this evaluation may include [insert resourcing and what area they represent]

[*If using consultants:* Resourcing also includes the cost of the consultancy contract, to be managed by the [evaluation area / policy area] with funding from [insert funding area].

1. Adapted from the Department of Industry, Science, Energy and Resources [↑](#footnote-ref-1)