

Research Terms of Reference (ToR)

This Research ToR master template has been developed for those who are commissioning research projects in Tearfund. It is an adaptation and extension of the Oxfam Research ToR Template¹ and is also informed by Daehnhardt & Bollaert (2021).² A completed ToR is for use internally and parts of it can be shared with (potential) research consultants. It is an effective tool for communicating what Tearfund wants to get out of the research and justifying why it is being conducted or commissioned. It also helps with careful, advance planning with regards to research ethics (see Section 8).

There are 15 sections in this master template, with guidelines on how to complete each section in red. Replace the red instructions with normal text as you are writing up the ToR.

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¹ Walsh, Martin (2019) *Terms of Reference for Research Template*, Oxford: Oxfam GB

<https://policy-practice.oxfam.org.uk/publications/terms-of-reference-for-research-template-253035>

² Daehnhardt, Madleina and Cathy Bollaert (2021) *Doing research ethically – principles and practices for international development practitioners and evaluators*, Teddington, London: Tearfund and Christian Aid

<https://learn.tearfund.org/en/research-and-policy/how-we-research>

Acronyms

List all acronyms used in this document, and any that might be useful for the research consultant to know, particularly if they have not worked with Tearfund before.

Eg CCM Church and community mobilisation

1. Background

Research title:

One or two lines are sufficient here – concise and crisp.

Why is this research being commissioned?

Briefly outline the overall topic of the research and why it is important to Tearfund’s work (maximum 500 words).

2. Purpose

State the primary goal of the research here. What do you want to achieve by doing this research? (maximum 300 words).

3. Key objectives and research questions

List 2-4 more specific objectives which flow out of the overall goal. Make the objectives as clear and concise as possible. You can list them in order of importance (but make clear that you have done so).

Based on the objectives, write your research questions underneath. When answered, these questions should enable you to meet your research objectives.

Questions can be in bullet point format. It is better to focus on a few key questions rather than to list many, as the research should be as focused as possible. It is crucial to formulate the question with a question mark at the end, rather than as a statement. Consider prioritising the questions in order of importance, and have a conversation with your research consultant about how to rank them. For example:

Eg Objective: To measure the cost effectiveness of CCM

Research questions:

- Can the impact of CCM approaches be quantified?
- Are CCM approaches cost effective?

Objective:

Research questions:

Objective:

Research questions:

4. Existing and missing secondary data

Provide a list of secondary data here, including hyperlinks if available. This might include background documents such as project reports, evaluation reports, previous research etc, which will be essential to consider as part of the research. Indicate if there is any other ongoing research on a related topic within Tearfund which should be consulted.

Then think about what data is missing or which groups are unrepresented and how your data collection will fill this gap.

Title of document with hyperlink	Year of publication	Methods used	Groups included as participants	Relevant key finding(s)

What data or which research participant groups are missing from the existing secondary data?

List 2-3 bullet points.

How will this research fill that gap?

List 2-3 bullet points.

5. Research methods

Based on your thinking regarding the overall goal and objectives of the research, as well as the ways you would like it to be used by different audiences, consider the type(s) of methods that would be best suited to the type of data you want to generate. For example, qualitative interviews, or statistically significant survey results? This will inform your discussion with the research consultant who will work out the detailed research methods and tools.

Below is a list of some data collection options:

- Desk review/ literature review
- Structured, semi-structured or unstructured interviews
- Key informant interviews
- Focus group discussions (FGDs)
- Direct participant observation
- Household survey
- Questionnaires
- Participatory photography & video

6. Dissemination plan

When drafting the Research ToR, please fill in the dissemination plan as well as you can. Then, update the plan during the course of the research and when you have the findings.

Name of stakeholder or audience	How will they be reached?	Will they need resources to be translated?	What will they use the findings for?	Who else can help or provide sign-off?
Internal stakeholders or audiences				
External stakeholders or audiences				

7. Planning for primary data quality

Please consider how to be rigorous and achieve good-quality data when working with the external consultant during the data collection phase, whether that is in the UK or overseas.

Ask yourself the following questions and briefly reflect on them in this section of the ToR:

- How will you ensure that the authenticity of the interviewee's answers is maintained? Taking notes may be the easiest and cheapest way, but will it ensure high quality?
- How will interviews be recorded, transcribed and, if necessary, translated into English? Will this be verbatim – word for word – to allow for verbatim quotes of research participants? Will you hire the best available professionals for this?
- How will you ensure that the quality of the interview transcriptions is good? Will you hire a professional proofreader?
- Who will interpret on-site for the research consultant in the relevant language (if the data enumerator is not fluent in the relevant local language)?

8. Research ethics – ethical risks

Answer the following questions.

Does the research involve human participants (eg surveys, interviews, FGDs, case studies, participatory methods, storytelling, observations etc)?	Yes/No (delete as appropriate)
Does the research involve the collection and/or the analysis of secondary data that is not publicly available?	Yes/No (delete as appropriate)
Does the research involve the analysis of secondary data that has the potential to harm vulnerable groups, communities and/or organisations?	Yes/No (delete as appropriate)
Does the research involve analysing records where an individual's information has not been anonymised?	Yes/No (delete as appropriate)

If you have answered YES to any of these questions, it is good practice to complete an ethics risk assessment.³

Is the ethics risk assessment complete?	Yes/No (delete as appropriate and provide a hyperlink)
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9. Person specification/team composition

Identify the qualities ideally required for the consultant(s) and if there are multiple team members, eg team leader and researcher. Will you need a researcher skilled in qualitative or quantitative research methods? Do you want someone with a certain level of experience/area of expertise? Do they need a background in international development work, or another discipline (eg social work, anthropology, religious studies)? Knowledge of a particular geographical region or language? If you have a particular consultant in mind, have you reviewed a writing sample?

10. Identified key informants

Who are the key people who will need to be consulted by the researcher? These might include Tearfund staff, partner staff and other key stakeholders.

³ A template for an ethics risk assessment can be found in Daehnhardt, Madleina and Cathy Bollaert (2021) *Doing research ethically – principles and practices for international development practitioners and evaluators*, Teddington, London: Tearfund and Christian Aid <https://learn.tearfund.org/en/research-and-policy/how-we-research>

11. Planned key deliverables

List the expected deliverables, for example reports, summaries, infographics, contact list and presentations/slide pack. Be as specific as you can about what is expected.

Examples:

- Non-designed 'raw' academic report for internal use (30–50 pages)
- Co-branded and designed full research report (60–70 pages)
- Designed summary report including graphics (10–30 pages)
- Policy briefing paper (4–6 pages)
- Stand-alone executive summary (2–4 pages)

Deliverable	Specification/expectations
Eg Executive summary	<ul style="list-style-type: none"> ● Standalone document; maximum two pages ● 'Glossy' design using Tearfund branding ● Content and structure to include: research subject and methods; major findings; conclusions and key insights

12. Timings

Set out clear deadlines and a timeline for the completion of the research.

Include preparation stage, fieldwork, analysis and writing-up stages in your plan. Planned activities could include: draft ToR, final ToR, sign contract with consultant, complete literature review, design method tools (survey/interview guides), conduct fieldwork, complete data analysis, draft report, final report, proofreading and copyediting, design and printing, delivery of final and other outputs.

Approximate date	Activities planned
Eg July 2020	Complete desk review of relevant documents

13. Responsibilities

Set out clearly who is responsible for different aspects of the research project. Please add more rows to the table as you see fit and delete existing ones if they are not relevant. Indicate collaborators in brackets (if any). It is very important to set out this information from the beginning so that everyone involved is clear about procedures.

Activity or deliverable	Who is responsible?
Finalise scope of research (ToR)	
Source external consultant and establish contract, get HR policies signed	
Communicate with consultant throughout (main point of contact)	
Organise logistics for field research	
Design research tools & conduct field research	
Check research tools/questionnaires are aligned with research question and goals	
Data recording, ordering & analysis	
Comment on draft report written by consultant, request changes	
Comment on translation of report/summary	
Final report write-up and summary	
Final sign-off of report content	
Production of infographics/videos	
Comment on design of research report/summary	
Liaison for professional printing of report/summary	

14. Budget

This section is for internal use only. When sharing the ToR with an external consultant, delete this section.

Depending on the stage you are at in your planning, you may or may not have a detailed budget for your research. Either way, it is useful to start to think about how you will divide up your total budget. Below are some costs to consider, and there is space for you to estimate how much of the budget you will assign to each of these. Add more rows to the table if you need to.

Overall budget: insert overall budget amount

Deliverable/activity	Budgeted amount (indicate currency)
Desk-based literature review	
Travel costs for researcher/team	
Visa costs for researcher/team	
In-country costs for researcher/team (accommodation, food, travel)	
Researcher/team salary (package agreement or based on x £ per day for x days, adapt UK rates locally if necessary)	
Translation of final materials for dissemination	
Cost of interpreter	
Copy editing and proofreading (via Comms for Development)	
Graphic design	
Printing costs and materials	
Contingency	
TOTAL	

15. Sign-off

Presuming that an ethical risk assessment was required for this research (see Section 8), the Research ToR should only be signed off if the assessment is complete and a valid hyperlink is provided to the completed assessment under Section 8.

Research ToR prepared by
(name, job title, date)

Research ToR signed off by
(name, job title, date)



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