TOOL

24

Developing gender-responsive terms of reference

Education
2030

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Objectives

The objectives of this tool are to:

- highlight the purpose and value of a terms of reference;
- encourage critical reflection on what makes a good terms of reference in general;
- provide guidance on making terms of reference gender responsive.

Key information

Setting the scene

A high-quality terms of reference (ToR) document is vital for the success of many pieces of work.

Purpose

A ToR explains:

- the **scope and boundaries** of a piece of work. This helps everyone involved to understand what is, and is not, going to be included. It also ensures everyone has the same starting point in terms of understanding key concepts that will be central to the work;
- the **main tasks** or actions that need to be carried out;
- the **roles and responsibilities** of key stakeholders;
- the **timeline** and key deadlines;
- important **budgetary considerations** or limitations;
- the expected **outputs**.

When do we need to use a terms of reference?

Terms of reference documents are useful for any pieces of work where multiple stakeholders need to understand their roles and how they fit into the overall purpose and activities.

They are most commonly used as a tool to instruct or guide individuals or teams of consultants and researchers working on, for instance, situation analyses, evaluations, surveys, research projects or training activities. However, they can also be useful for guiding the work of staff teams who are about to engage in a new project. We should not see a ToR as something only to give instructions to external personnel or service providers.

Creating a good ToR

Having a good ToR is vital. Lack of clarity about the purpose and direction of a piece of work increases the risk that the people involved will interpret the work differently, or have different expectations. A ToR helps to ensure that everyone involved is 'pulling in the same direction'. Unfortunately, ToRs are often not sufficiently clear. Much time can be wasted mid-project when the lack of clarity starts to have an impact on activities, findings, or outputs. At this point, the people involved may realize they need to review and revise the ToR before the work can continue, or be completed to the required standard. In addition, ToRs are not always realistic. They may outline ideal expectations, which cannot be achieved within the given timeframe or budget.

To write a good ToR requires:

- sufficient time, so that the draft can be well-considered by the author(s), reviewed by others, and revised;
- clear understanding of the context and why the work is needed, and that this needs to be conveyed clearly and succinctly to the reader;
- consultation with key people (e.g. the donor, project staff, grassroots stakeholders, people

who will use the end results or outputs) to ensure the ToR is prioritizing the most important things;

- review by a critical friend – it can be helpful to ask someone external to the project, who has experience of conducting similar work, to review the ToR and highlight expectations that are unrealistic or unnecessary, or other information that is not clear;

- willingness to compromise between the maximum that is desired, and what is feasible, given the constraints that exist.

Gender-responsive ToR

A ToR that lacks clarity and feasibility – perhaps because it has been written in a hurry or written without wider consultation – potentially also lacks other important elements. One such element is gender responsiveness.

Gender considerations will be relevant – to a greater or lesser extent – in every piece of research, evaluation or training activity. The ToR needs to acknowledge this. It needs to highlight any specific considerations or expectations relating to gender (and indeed relating to other issues of discrimination and diversity, such as disability or language).

Self-study and/or group activity
Reflect on your experience of ToR

- On your own, or in a group, think of a project you have been involved in that required a ToR to be written. This may have been a ToR for an external consultant, or to guide an investigation by internal staff.

- List all the things that went well with the project or investigation; and all the problems that were encountered.

- Critically reflect on whether any of the problems may have been due to lack of clarity or feasibility in the ToR.

- Was anything not properly anticipated or explained, which led to a misunderstanding?

- Were any of the expectations too ambitious?

- Could the ToR have helped to avoid these problems, and if so, how?

Key issues to consider when writing a gender-responsive ToR

Gender issues should be considered in every piece of research, evaluation, and other knowledge products. When preparing the ToR, you need to be clear about the extent to which these issues must be considered.

The ToR should consider the points listed below:

Gender of the consultant(s) or researcher(s)	• Is the gender of the consultant/researcher relevant (e.g. if the research is on a sensitive subject like rape, and will be carried out entirely with female rape survivors, do you need to consider hiring a female researcher or data collectors)? • If you are suggesting in the ToR that the work needs a team of consultants or researchers, are you expecting a balance of female and male? Or are there other considerations regarding the ratio of female to male team members? • Make sure you follow employment law with regards to specifying the gender of candidates.
Experience of the consultant(s) or researcher(s)	• Does the consultant/researcher need an understanding of gender issues in general? • Do they need to have experience of gender analysis more specifically? • Is such experience essential, or just a desired requirement for the consultant/researcher to fulfil this ToR? Consider what might happen if a consultant/researcher with no gender analysis experience carries out the work outlined in the ToR. • If your consultant/researcher does not have sufficient awareness or experience at the start, can the necessary capacity building be done to the right level and in the right timeframe? How?
Topic to be investigated	• Who selected the overall topic for the investigation, and why? • Is gender discrimination/equality a central focus of the topic under investigation? Should it be? • Has gender discrimination/equality been considered when setting the objectives of the investigation? • Does the topic relate to, or affect, girls, boys, women and men? • How much is already known about this topic? Is there any existing sex-disaggregated data for this topic? Or does existing information focus mostly on men/boys or on women/girls only?
Designing the investigation	• Have female and/or male stakeholders been involved in choosing the topic and setting the overall objectives of the investigation? • To what extent will the consultant/researcher be required to work with female and male stakeholders on the detailed design of the investigation (e.g. preparing the research plan, sampling approach, data collection tools, and analytical approach)?

	• To what extent will the consultant/researcher be required to consider gender analysis in the detailed design of the investigation? • Will they be required to consider gender issues when choosing research locations and target groups of respondents, and when designing their sampling approach? • Will they be required to use gender-sensitive research questions and collect sex-disaggregated data? • Are there any specific gender-sensitive data collection tools the consultant/researcher should use? • Are there gender-sensitive indicators for the consultant/researcher to use when analysing data relating to changes over time? Or will they need to develop such indicators? Is there baseline data for these indicators or does this need to be identified? Are these indicators both qualitative and quantitative?
Disseminating findings	• Will the consultant/researcher be obliged to present gender-related findings and gender-disaggregated data in the final output, even if the investigation is not primarily focused on gender issues? • Will there be other ways for gender-related findings to be documented and shared? • Will the consultant/researcher be expected to analyse and present findings in relation to gender-related legislation or policies? • Is there an expectation that findings will influence policy around gender equality, or an expectation that the consultant/researcher will develop a plan for how to influence policy?

Self-study and/or group activity
Analyse a ToR for gender responsiveness

• On your own, or in a group, find a ToR that has been used within your project or organization.
• Try to pick one at random. It could be for any sector, not necessarily education. Alternatively, if you are currently developing a new ToR, use that.
• Critically review the ToR. Use the questions in the table above to guide your analysis.
• Do you think the ToR adequately highlights gender-related issues? Why? Or why not?
• Would this ToR ensure the research or other activities have a sufficient focus on investigating or promoting gender equality?
• If not, what else could the ToR say?

Further reading

United Nations Evaluation Groups. 2010. *UNEG Quality Checklist for Evaluation Terms of Reference and Inception Reports.* Has a checklist section on gender. www.betterevaluation.org/resources/guides/tor/checklist.

ILO Evaluation Unit. 2014. *Integrating Gender Equality in Monitoring and Evaluation of Projects.* Has a checklist section on integrating gender considerations into evaluation terms of reference. www.ilo.org/wcmsp5/groups/public/---ed_mas/---eval/documents/publication/wcms_165986.pdf.

ILO Evaluation Unit. 2015. *Writing Terms of Reference (TOR). Checklist.* Includes various checklist questions around gender. www.ilo.org/wcmsp5/groups/public/---ed_mas/---eval/documents/publication/wcms_165971.pdf.