Evaluation of 'Track' Software
Terms of Reference

1. Background of the project and rationale for the evaluation:

Track is Tearfund's Design Monitoring and Evaluation web-based system which was developed in house, using agile methodology and a cascading training model. It is designed for staff and partners to be able to follow project progress throughout the project cycle.

There are 4 key benefits that are highlighted to users during training:

1. Visibility of strategy, programmes and project data.
2. A consistent approach to capturing and assessing data across all of our projects, programmes and initiatives.
3. greater assurance of the quality of data. We've intentionally built in more data validation and approval points into the system.
4. It is the first building block towards our Global Systems Programme (GSP). Track is the pioneering project in the integration of our systems across finance, partner, grant and logistics management.

For a full list of intended benefits please refer to the table in the annex.

Track was initially scoped in 2016 and has undergone iterations since then. It went live after the first training in May 2018, with country teams utilising it after their training; the last team received training March 2020. (over 2 years since the start and over 6 months since the last country team was trained).

Track was designed for Staff and partners to be able to design projects and programmes, monitor progress against indicators, write reports and link evaluations, stories and research against the project.

This evaluation is designed to assess to what extent the system is meeting Tearfund's needs as outlined in the key benefits in the annex and why/ why not; to what extent the perceived benefits of the system are being outworked, any barriers or bottlenecks preventing the needs being met, and to make recommendations on how Track can be improved to meet the organisational and stakeholder needs.

2. Goal, objectives and questions

a) Evaluation Goal

This evaluation is designed to understand the outcomes of the system, and map those back against the benefits realisation plan.

b) Evaluation objectives and questions

a) Assess achievements and outcomes – what has been achieved to date? What outcomes have or have not been realised? How do these map to the perceived benefits?
   i) Include two case studies from partners and two case studies from Tearfund staff of positive benefits being realised.
   ii) Identify critical differences between positive and negative outcomes.
   iii) Identify any barriers or bottlenecks preventing the needs being met
b) To what extent does Tearfund's culture help or hinder the intended benefits being realised? Assess the usefulness of the resources and communication;
   i) Quality and use of training materials
   ii) Cascading approach to communication & training.
c) To what extent has Track been embedded in Tearfund's processes?
d) Future priorities – Recommendation on future developments to system;
   i) Assess the User interface (UI)
   ii) Functionality of the system
      1) Offline
      2) App
   iii) Language & translation
   iv) Training resources and support.

3. Scope

- How the system kept up to date with organisational changes and needs?
- Gather the outcomes of Track; intended and unintended, positive and negative.
- Efficiencies - difference in terms of time to develop projects. Culture change for the system? Costs / Benefits? What potential benefits for the partners?
- Provide recommendations for improving the system to align with the wider Development sphere? To keep Track ahead of new requirements, and what investments in Track are required to keep ahead of these requirements
- Framing within wider systems - testing and understanding the culture, attitude and practice around Track and how this applies more broadly to systems
- To what extent do users feel Track meets their needs, and are their requirements responded to?

Out of scope

- Uptake of use of Track & quality of the data in the system
- Global Advocacy and Influencing teams use of the system

4. Methodology

- The precise methodology will be left up to the consultant to define. It will have to be in line with remote methodologies during the Covid 19 Pandemic
- We expect the principal methodology to be one to one interviews with key stakeholders and the consultant to facilitate some remote focus group discussions with a Cluster or Country or partner team to draw out findings. Creative ways to engage stakeholders remotely is encouraged given there is no opportunity for face to face meetings.
- Desk review of system plans and key documents. Full list and access will be give at a later date
- Engage with and represent a variety of stakeholders
    - Stakeholders to be consulted must include
        - Partners,
        - Country Directors,
        - Project officers
        - Thematic advisors
        - Humanitarian support
        - Program funding
- We would like the successful applicant to suggest a detailed methodology which could include Outcome harvesting as a methodology to answer key evaluation questions. The finalised methodology will be agreed between Tearfund and the consultant.

5. Governance and accountability

Commissioned by the Track Manager & approved by the I&E team lead.

The external consultant will be expected to work with the Track System Training Consultant in the process of the evaluation.

The external consultant will be responsible for:

Producing an inception report which will include a detailed methodology,

Conducting primary and secondary research to answer the evaluation questions

Submission of interim findings for verification and discussion

Submission of final report using agreed template

Presentation of key findings and facilitation of discussion

The Track System Officer will be responsible for supporting logistics & being a point of contact for questions.

Steering group representatives will be responsible for a review of the evaluation quality.

6. Timetable/schedule - *Negotiable*

Approximate Date (MM/YYYY)	Activities planned
15th of November	*Advert closes*
End of November	Consultant selection Interviews - includes discussion on methodology
End of November	Finalise Inception report including proposed methodology.
	Desk based research & Review of existing data
	Primary research
	Validation of findings.
	Write up.
Jan / Feb	Presentation of findings.

7. Evaluation Output

Inception report

Initial findings for validation

Final report

A presentation to the steering group with time for Q&A - Recorded for other internal stakeholders.

A report with the following expected structure:

- Executive summary: Summarises what the report is about, the project purpose, the evaluation purpose, the methodology used, the key findings, the conclusion and recommendations (max 2 pages)
- Introduction: States the purpose of the evaluation

- Methodology: Explains where the evaluation was carried out and the data collection and analysis tools that have been used
- Context analysis: Gives a brief overview of the context
- System overview: Summarises the main problem that the system is addressing and an overview of the system
- Key findings: Shares and analyses the key findings for each of the evaluation questions
- Conclusions: Draws out the main points from the analysis of the findings
- Recommendations: Makes specific, actionable recommendations to the team and wider organisation. In order for recommendations to be realistic and feasible its essential the evaluator understands the constraints of the project
- Annexes: Includes copies of questionnaires / surveys / focus group questions used

8. Dissemination plan

We will work with the consultant to agree the dissemination plan which will outline:

The stakeholders & audience

Outputs

Reports, presentations, infographics?

What will they use the findings for?

Will they need the resources translated? If so, indicate language(s)

9. Assessment of the Evaluation

The evaluation will be assessed against Tearfund's Evidence Principles, developed by BOND (Voice and Inclusion, Appropriateness, Triangulation and Contribution and Transparency). Further details of what is included in each of these categories can be found here.

10. Annex

Benefits outlined in the Track Business plan
Fundraising growth target could be supported by greater access to project metadata. This would enable Tearfund to remain competitive in an increasingly demanding marketplace and ensure its integrity and transparency.

Data would be collected, accessible and utilised at the most appropriate levels for key decision making and learning (Corporate, Country Strategy, Programme/Project, Initiative, Partner). Greater visibility and confidence in the data would enable better questioning of what is working and not working.
High value donors', including US megachurches', requirements for reach and impact data would be met more efficiently and donor relationships enhanced.
Being able to view the status of projects as partners submit data at activity level will reduce effort required by country teams in verifying content in quarterly and 6 monthly reports. It would enable more rapid feedback and transparency of project progress.
Reduced errors in partner data if data is submitted at activity level rather than in bulk at report time when copying from paper notes. It would support partners in making programmatic improvements on quality and impact.
Improved organisational efficiency by reducing duplication of effort and staff time on asking the same people for the same information in order to be able to report to internal and external donors. i.e. request for impact and beneficiary data. The source of information will be in one place. Staff workload could be reduced freeing them up for more time for interpretation of data and working with key stakeholders (partners, staff, donors) on areas for improving programme quality and impact.
For the first time it would be possible to see information on all our frontline projects in one place, and aggregate these to understand the scope and scale of Tearfund's work as a whole.
A foundation for and first step in redeveloping IBIS (Tearfund's International Budgeting Information System).
Beneficiary accountability and empowerment would be enhanced. As Tearfund's data becomes easier to understand and better presented this facilitates more direct interpretation of the data itself by stakeholders particularly the communities we are serving. This in turn leads to a better common understanding of the data.