Terms of Reference for Commissioning Evidence Gap Maps

ProjectADD *– Add whenever you see “ADD”; sentences in italic contain additional information for commisioning organisations*

Date: December 2023

**Consultancy: “TopicADD: Evidence (and) Gap Map”**

For the period from DateADD until DateADD

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**About OrganisationADD**

*Here you can add information about your organisation/company/institute.*

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# Content of the project

*Throughout this section you can outline the project and/or the context in which this contract will be embedded.*

## Background of the project (ADD)

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## Purpose of the project (ADD)

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# Scope of the contract

## Overall objective of the contract

OrganisationADD is requesting applications for a consultant team with experience in evidence mapping and synthesis to develop an **Evidence (and) Gap Map (EGM)** that maps the high-quality evidence on TopicADD. The main aim of the EGM is to guide policy makers and practitioners to available evidence that supports decision-making, and to inform research priorities in order to fill evidence gaps. A definition of an EGM can be found below:

“*Evidence gap maps are thematic collections of impact evaluations and systematic reviews of the effects of international development policies and programs. This evidence is mapped onto an interactive framework of interventions and outcomes. This framework makes the existing evidence easily accessible and graphically highlights where there is an abundance of evidence and where the important gaps are in the evidence*.” (3ie, 2023)

The key research questions that the EGM shall answer are[[1]](#footnote-1):

1. What are the extent and the characteristics of the available rigorous evidence on TopicADD in ContextADD?
2. What are important rigorous primary research and evidence synthesis gaps on TopicADD in ContextADD?
3. What intervention and / or outcome areas could be prioritized for primary research and / or evidence synthesis?

The consultant team should articulate a credible plan to answer the research questions above in their application. The consultant team and the OrganisationADD team might jointly add or specify questions in the inception phase, e.g. when developing the framework or discussing the research protocol. To answer the questions, the consultant team is expected to consult with relevant stakeholders to decide on the focus of the evidence map and produce a framework of interventions and outcomes. The consultant team will then conduct searches to identify relevant published and unpublished impact evaluations and systematic reviews on TopicADD. Expectations on detailed activities and deliverables are defined in the next section.

In doing so, the EGM serves two main objectives:

1. Support policymakers in **designing evidence-informed strategies, policies, and interventions** by easily **identifying relevant Impact Evaluations (IEs), meta-analyses, and Systematic Reviews (SRs)** for the areas specified within these terms and in the kick-off meeting.
2. Support researchers and policymakers in **building strategic research agendas by**:
	1. Identifying **absolute gaps** of evidence where little or no primary studies exist. In these areas, conducting or commissioning **new IEs** might be particularly useful.
	2. Identifying **synthesis gaps** of evidence where many IEs, yet no or few SRs exist. In these areas, conducting or commissioning **evidence syntheses** (in the form of SRs or meta-analyses) might be particularly useful.

## Activities and deliverables

To develop the EGM, the consultant team shall undertake the following specific activities and submit the following deliverables:

1. Participate in at least one project kick-off workshop with OrganisationADD.
2. Lead at least one expert workshop to inform the scope and framework of the EGM. The expert group will contain key representatives from academia, national development organisations, civil society, and international organisations. OrganizationADD will convene the members of the expert group but will ask for the input of the appointed consultant team on possible members and on how to organize the meetings. The expert group will typically contain between 6-8 members, although may be larger if there are significant divergences in perspectives on the topic and it is important to represent these divergent views and to bring them on board to the project.
3. Based on the consultation with the experts from within and outside of OrganisationADD and the review of relevant literature, develop:
	* a theory of change for the TopicADD to indicate how interventions in the sector of interest are expected to influence key outcomes.
	* the [EGM framework](https://onlinelibrary.wiley.com/doi/10.1002/cl2.1125), that is, the categories of interventions and outcomes for the EGM, as well as any filters of interest (for example, population sub-groups). Upon completion, the framework shall be reviewed by the OrganisationADD team as well as the expert group (if deemed necessary by OrganisationADD).
4. Formulate a review and search protocol (up to 15 text pages, plus graphs and appendices)[[2]](#footnote-2), that:
	* defines population, interventions, comparison, outcomes as well as study designs (PICOS) and clearly defines inclusion and exclusion criteria;
	* outlines and describes the EGM framework;
	* lists the databases and websites to be searched;
	* describes the search and screening strategy by presenting a list of key words used for the search term as well as the final search string for each database, documenting potential specifications and limitations of each database (at least one example for a particular data base);
	* presents the data extraction and coding plan;
	* outlines the approach taken to appraise the quality of systematic reviews and meta-analyses (e.g., based on [3ie’s SURE assessment](https://www.3ieimpact.org/sites/default/files/2019-04/quality-appraisal-checklist-srdatabase.pdf)) and potentially of impact evaluation studies[[3]](#footnote-3).
5. Update OrganisationADD after completing the searches and again after completing the screening, to establish the final EGM workload and make decisions on how to proceed given available budget.
6. Compile the datasheet that contains the data extracted from the included studies.
7. Compile a graphical and interactive online representation of the EGM[[4]](#footnote-4).
8. Write a high-quality EGM report (up to 35 pages, plus graphs and appendices), that describes and analyses the evidence basis, highlights the availability of the evidence and ‘absolute gaps’ where few or no studies exist, as well as ‘synthesis gaps’, where many impact evaluations, yet no or few systematic reviews exist. The report shall also describe certain characteristics of the depicted evidence, such as confidence ratings of the systematic reviews. It shall provide a forward-looking review of possible priority areas of research. Reporting needs to follow the [PRISMA](http://prisma-statement.org/documents/PRISMA%202009%20checklist.pdf) (Preferred Reporting Items of Systematic Reviews and Meta-Analyses) guidelines. However, the report should be written in a way that it is also easy to process for political decision makers and development practitioners.
9. Compile a Policy Brief (up to six pages or around 1.500 words excluding references and notes)[[5]](#footnote-5) with max. two graphics (max. 1/3 of an A4-page each) summarising the most important findings of the EGM and derive implications in an easy to read and use format. This brief’s target audience are political decision makers and development practitioners.
10. Present the EGM in one to two dissemination workshops (presumably online) and outline the overall dissemination strategy. Specifics will be developed throughout the kick-off workshop and refined as the project progresses.

## Methodological expectations

The EGM will be created according to the standards and guidelines established by the International Initiative for Impact Evaluation (3ie) and the Campbell Collaboration, which can be found following these links:

* Snilstveit et al. 2016. [Evidence & Gap Maps: A tool for promoting evidence informed policy and strategic research agendas](https://www.jclinepi.com/article/S0895-4356%2816%2930190-1/abstract)
* Snilstveit et al. 2017. [3ie evidence gap maps: a starting point for strategic evidence production and use](%E2%80%A2%09https%3A/www.3ieimpact.org/evidence-hub/publications/working-papers/3ie-evidence-gap-maps-starting-point-strategic-evidence)
* White et al. 2020. [Guidance for producing a Campbell evidence and gap map](https://onlinelibrary.wiley.com/doi/10.1002/cl2.1125)

OrganisationADD expects that the consultant team will commit to best practice in conducting an EGM including publishing a protocol that pre-specifies methods prior to searching to avoid introducing bias. Details of the design and scope of the EGM will be discussed in a kick-off meeting.

## Team specification

OrganisationADD would welcome applications from single institutions or consortiums. If the applicant consultant team is a consortium of institutions, the application should describe the role of each institution and demonstrate how they would work together to ensure the work on the EGM will be well-integrated. Applications will be accepted only from legally constituted institutions and not from individuals only.

**Core team**

The core consultant team should consist of senior researchers and supporting researchers. The core consultant team should include members with previous experience of undertaking evidence synthesis and / or evidence maps in TopicADD or combine team members with strong synthesis / mapping experience and team members with strong background in research on TopicADD. OrganisationADD’s preference is for the team to contain an information specialist or librarian on the team to produce search strings. As a minimum, OrganisationADD expects that the search strategy, including search strings, will be reviewed by an information specialist or librarian before being finalised. The consultant team should determine one team leader and one team member who will be OrganisationADD team’s contact person (these may be the same person). If for any reason, the determined team leader drops out of the contract, replacement must be provided within two weeks. All changes within the core team must be agreed with the OrganisationADD team.

**Supporting staff**

If the consultant team hires additional supporting staff, for example to undertake screening or data extraction, it is their responsibility to ensure sufficient qualification of the supporting staff (see below for minimum qualifications) and diligent quality assurance by the core team in such a way that the quality of the products is guaranteed at each stage of the process. From the very beginning on, the consultant team needs to be transparent about the tasks in which the supporting staff will be involved in.

## Responsibilities between contractor and customer

The consultant team will conduct their tasks independently, but in close consultation with OrganisationADD’s team. To guarantee close consultation, the consultant team commits to regular meetings with OrganisationADD’s team in order to provide an update of the process and discuss any given issues. The frequency of these meetings is to be determined with OrganisationADD’s team, but should at least be once a month. Furthermore, the consultant team will consider and respond to both oral and written comments and remarks from the OrganisationADD’s team.

The consultant team will be responsible for project management and quality assurance across all steps of the project. It is the responsibility of the consultant team to deliver all outputs to OrganisationADD’s team in a timely manner and in high quality. The consultant team will notify OrganisationADD’s team should it become obvious that the schedule cannot be kept.

There will be the possibility for OrganisationADD’s staff to contribute to the EGM in such a way that it warrants co-authorship of the final product.

# Volume of work and timeframe

The duration of the services to be performed shall be from 202X-XX-XX to 202X-XX-XX. It shall follow this tentative schedule:

|  |  |  |
| --- | --- | --- |
|  | TASKS/SERVICES (EGM) | tentative dates |
|  | Kick-off meeting (virtual): | 202X-01-01 |
|  | Expert Workshop (virtual) | 202X-01-15 |
|  | Discussion and review of framework and draft search protocol (virtual) | 202X-03-01 |
|  | Submission of final search protocol | 202X-03-22 |
|  | Submission of EGM (e.g. as an Excel sheet) | 2024-07-31 |
|  | Submission of draft EGM report | 202X-08-15 |
|  | Submission of draft of graphical and interactive online representation | 202X-08-15 |
|  | Presentation of EGM report (virtual) | 202X-09-15 |
|  | Submission of final EGM report | 202X-09-15 |
|  | Submission and presentation of final graphical and interactive online representation | 202X-09-15 |
|  | Submission of policy brief | 202X-10-01 |
|  | Workshop presentations | 202X-10-08 |

***On average, a mid-sized EGM takes around 10 months to complete.*** *Depending on the size and the scope of an EGM, more or less time may be needed. Also, please note that the number of required feedback loops for the draft products can vary significantly depending on the bidder’s experience with such products.*

# Criteria used to award funding

*The following criteria can be used to assess bidders’ qualifications. Further details (e.g. with regard to the weighting, the required proofs of qualification, and the scales used to assess the criteria) need to be specified in line with internal tendering requirements and procedures.*

**A-criteria: Review of suitability of the consultant team**

*These are exclusion criteria, so there is usually only a “Yes” or “No” assessment possible.*

* All core team members have a **university degree** (minimum master degree or equivalent).
* The core team can collectively demonstrate strong expertise in evidence mapping and / or evidence synthesis **in the field of TopicADD**. Specifically, the core team should include members with previous experience of undertaking evidence synthesis and / or evidence maps in TopicADD or combine team members with strong synthesis / mapping experience and team members with strong background in research **in the field of TopicADD**.
* Team leader has (co-)authored and significantly contributed to at least **1 EGM or 1 Systematic Review**.
	+ A significant contribution comprises but is not limited to:
		- Input in the conception of the EGM.
		- Participation in defining and monitoring of the search terms.
		- Experience in writing styles targeting decision makers and practitioners.
* **All supporting staff** will fulfil all the 3 following qualifications:
	+ **They have at least an undergraduate university degree or equivalent**.
	+ They have **participated in at least one initial session of training in EGM methods** before starting work on the study and will receive ongoing training / support throughout the study.
	+ **They have at least one previous example of work experience** in the field of TopicADD (e.g., internships, jobs as a student assistant etc.).

**B-criteria: Assessment of the proposed methodological approach**

*Criteria mentioned here serve as examples only. Other tasks or deliverables are possible but should not overlap with the A-criteria.*

* A technical proposal (up to 6 DIN-A4 pages) that recommends a methodological approach, suitable to address the research questions described in the Terms of Reference. This includes, but is not limited to, the approach to development of an appropriate scope and EGM framework, presentation of some preliminary inclusion and exclusion criteria based on some scoping of the topic as well as information on the graphical representation of the later EGM (including hosting). Key risks to project delivery and mitigation strategies should also be mentioned.
* A concept for the search strategy (within the technical proposal), databases to be searched, the approach to keyword searching and approach to the use of alternative strategies to identify studies. Access to relevant databases for the consultant team should be described.
* A detailed and realistic time and work plan that is aligned with the expected duration of the assignment.

*The following* *documents and certificates must be submitted with the tender to allow for an adequate evaluation of the consultant team’s suitability for the described services:*

* **Curriculum Vitae:** CVs of each of the core team members.
* **Work sample:** At least one protocol for an EGM or other type of synthesis study completed by the Team leader and / or core team members, which includes search terms and a detailed search strategy.
* **List of previous relevant research:** A list of relevant publications of the core team and links to the publications. This should include previous evidence gap map reports and / or other types of synthesis studies, as well as research on TopicADD.
* **Enclosures:** Further EnclosureADD

# Budget

*ONLY INCLUDE THIS PART SHOULD YOU NOT USE A TENDERING PLATFORM OR YOUR OWN TABLES.*

All applications must attach a budget with reasonable disaggregation across categories of costs. As it can be challenging to accurately cost synthesis work and evidence mapping when there is uncertainty over the extent of the evidence base, the budget should indicate how costs might change depending on the number of studies identified at different stages of the review, specifically during the searching process and then following the screening process. The application should include an estimated number of included studies and a justification for the estimated number.

OrganisationADD’s costs for EGMs range from XX EUR to XX EUR. Given the complexity of TopicADD and the likelihood of a large number of included studies, we expect the cost of the project to be towards the high end of the range.

1. *Note for commissioning organisation: please see the following 3ie protocol for some specific examples of research questions for an EGM:* [*https://www.3ieimpact.org/sites/default/files/2021-07/3ie-Human-Rights-EGM-Protocol.pdf*](https://www.3ieimpact.org/sites/default/files/2021-07/3ie-Human-Rights-EGM-Protocol.pdf) [↑](#footnote-ref-1)
2. *An example of an evidence gap map protocol can be found* [*here*](https://www.3ieimpact.org/sites/default/files/2022-08/HAEC-EGM-protocol.pdf)*.* [↑](#footnote-ref-2)
3. *The appropriate appraisal tool for primary studies will depend on the type of studies included in the review. For a list of possible appraisal tools, please see an overview* [*here*](https://guides.libraries.emory.edu/SRs/qa_tools)*.* [↑](#footnote-ref-3)
4. *Examples of online EGM platforms include* [*EPPI Mapper*](https://eppi.ioe.ac.uk/cms/Default.aspx?tabid=3790) *and* [*3ie’s EGM platform*](https://www.3ieimpact.org/evidence-hub/evidence-gap-maps)*.* [↑](#footnote-ref-4)
5. *An example of a policy brief can be found* [*here*](https://www.3ieimpact.org/sites/default/files/2021-12/Gender-SR-brief.pdf)*.* [↑](#footnote-ref-5)