Terms of Reference for Commissioning Systematic Reviews

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

Date: December 2023

**Consultancy: “TopicADD: A Systematic Review / Rapid Evidence Assessment“**

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 synthesis to undertake a **Systematic Review (SR) / Rapid Evidence Assessment** **(REA)** that identifies, appraises, and synthesises the high-quality evidence on TopicADD. The main aim of the SRs / REA is to inform policymakers, practitioners, and researchers, about the extent, quality, and findings of the available research evidence on a particular topic. A definition of an SR / REA can be found below:

*“Systematic reviews summarise the full body of evidence[[1]](#footnote-1) to assess a specific policy question. They do this by identifying, assessing the quality of, and synthesising the evidence from included empirical studies that address the question of interest. Systematic reviews can address a range of policy and practice questions, including, but not limited to, the effects of different interventions.” (3ie, 2023)*

*“Rapid evidence assessment is a type of evidence synthesis that addresses policy and programming questions when time and resources are limited. 3ie uses the same rigorous methodology as a systematic review but tightens the parameters to allow for completion in shorter timeframes.” (3ie, 2023)*

The key research questions that the SR / REA shall answer are[[2]](#footnote-2):

1. What are the effects of Intervention(s)ADD on Outcome(s)ADD for Group(s)ADD in ContextADD?
2. To what extent do effects vary by population group and location?
3. What factors relating to programme design, implementation and context are associated with better or worse outcomes?[[3]](#footnote-3)

The consultant team should articulate a credible plan to answer the research questions above in their application. The consultant team and the OrganisationADD’s team might jointly add or change questions in the inception phase, e.g. when developing the scope or discussing the research protocol. To answer the questions above, the consultant team is expected to consult with relevant stakeholders to decide on the scope of the review, develop clear criteria for inclusion and exclusion of primary studies, prepare an explicit and transparent search strategy and systematic procedures for data extraction, and offer a critical appraisal and analysis of included studies. Expectations on detailed activities and deliverables are defined in the next section.

## Activities and deliverables

To develop the SR / REA, 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 of the SR / REA. 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 but may be larger if there are significant divergences in perspectives on the topic.
3. Based on the consultation with the experts from within and outside of OrganisationADD and the review of relevant literature, develop a conceptual framework for the review and / or theory of change for the intervention(s) of interest to indicate how they are expected to influence key intermediate and long-term outcomes, the assumptions behind each step of the causal chain and possible moderating and mediating variables[[4]](#footnote-4). The conceptual framework and / or theory of change should guide the rest of the review. These outputs should be presented to OrganisationADD in a meeting before being finalised.
4. Formulate a review and search protocol (up to 30 text pages, plus graphs and appendices)[[5]](#footnote-5), that:
	* defines population, interventions, comparison, outcomes as well as study designs (PICOS) and clearly defines inclusion and exclusion criteria;
	* outlines and describes the conceptual framework and or theory of change;
	* lists the databases and websites to be searched,
	* describes the search and screening strategy, documenting potential specifications and limitations of each database;
	* presents the data extraction and coding plan;
	* outlines the approach taken to appraise the quality of included primary studies[[6]](#footnote-6);
	* outlines the approach taken to synthesise included primary studies, including the approach to effect size calculation and meta-analysis as relevant;
	* follows the [PRISMA](http://www.prisma-statement.org/) (Preferred Reporting Items of Systematic Reviews and Meta-Analyses) guidelines.
5. Write a high-quality SR / REA report (up to 50 text pages for an SR, up to 30 pages for an REA, plus graphs and appendices). The reporting should follow the [PRISMA](http://www.prisma-statement.org/) guidelines. However, the report should be written in a way that it is also easy to process for political decision makers and development practitioners.
6. Prepare a shareable datasheet (e.g., xls format) that contains the data extracted from the included studies.
7. Compile a Policy Brief (up to six pages or around 1.500 words excluding references and notes) with max. two graphics (max. 1/3 of an A4-page each) summarising the most important findings of the SR / REA and deriving implications in an easy to read and use format[[7]](#footnote-7). This brief’s target audience are political decision makers and development practitioners.
8. Present the SR / REA 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.
	1. **Methodological expectations**

The SR / REA will be created according to the standards and guidelines established by the Campbell Collaboration and the Cochrane Collaboration, which can be found following the links below.

REAs should draw on the systematic review standards and guidelines listed below but may take steps to reduce the time or resource burden required, for example by undertaking a more limited set of data collection, a more limited critical appraisal or focusing on a narrow intervention or outcome area.

**Systematic reviews**

* The Campbell Collaboration, 2021. [Campbell systematic reviews: Policies and guidelines](https://onlinelibrary.wiley.com/pb-assets/assets/18911803/Campbell%20Policies%20and%20Guidelines%20_May3%202022-1653054593497.pdf)
* Higgins et al. 2023. [Cochrane Handbook for Systematic Reviews of Interventions](https://training.cochrane.org/handbook)
* Kugley et al. 2017. [Searching for studies: a guide to information retrieval for Campbell systematic reviews](https://onlinelibrary.wiley.com/doi/10.4073/cmg.2016.1)

**Rapid evidence assessments**

* Garritty et al. (2020) [Cochrane Rapid Reviews Methods Group offers evidence-informed guidance to conduct rapid reviews.](https://www.jclinepi.com/article/S0895-4356%2820%2931146-X/pdf)

Initial details of the scope, design and the plan for delivery of the SR / REA will be discussed in a kick-off workshop. An additional scoping workshop will be conducted after the expert workshop. OrganisationADD expects that the consultant team will commit to best practice in conducting a review including publishing a protocol that pre-specifies methods prior to searching to avoid introducing bias and the assessment of primary study quality.

## 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 SR / REA 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 consultant core team should include members with previous experience of undertaking evidence synthesis in TopicADD or combine team members with strong synthesis 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 in such a way that the quality of the products is guaranteed at each stage of the process. From the very beginning on, it should be apparent, 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 the 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 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 SR / REA 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 (SR) | tentative dates  |
|  | Kick-off meeting (virtual): | 202X-01-01 |
|  | Expert Workshop (virtual) | 202X-01-15 |
|  | Scoping Workshop (virtual) | 202X-01-22 |
|  | Discussion and review of theory of change and draft search protocol (virtual) | 202X-03-01 |
|  | Submission of final search protocol | 202X-03-22 |
|  | Submission of SR data (e.g. as an Excel sheet) | 202X-09-31 |
|  | Submission of draft SR  | 202X-11-15 |
|  | Presentation of SR (virtual) | 202X-12-01 |
|  | Submission of final SR  | 202X-12-01 |
|  | Submission of policy brief | 202X-12-15 |
|  | Workshop presentations | 202X-12-15 |

|  |  |  |
| --- | --- | --- |
|  | TASKS/SERVICES (REA) | tentative dates  |
|  | Kick-off meeting (virtual): | 202X-01-01 |
|  | Expert Workshop (virtual) | 202X-01-07 |
|  | Discussion and review of theory of change and draft search protocol (virtual) | 202X-02-01 |
|  | Submission of final search protocol | 202X-02-14 |
|  | Submission of REA data (e.g. as an Excel sheet) | 202X-04-01 |
|  | Submission of draft REA | 202X-04-21 |
|  | Presentation of REA (virtual) | 202X-05-21 |
|  | Submission of final REA | 202X-05-21  |
|  | Submission of policy brief | 202X-06-01 |
|  | Workshop presentations | 202X-06-08 |

***On average, a mid-sized SR takes around 11,5 months to complete. A mid-sized REA takes around 6 months to complete.*** *Depending on the size and the scope of the SR / REA, 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 SR / REA
		- 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 SR / synthesis 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 SR / REA framework, presentation of some preliminary inclusion and exclusion criteria based on some scoping of the topic. 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 a SR or other type of synthesis study completed by the Principal Investigator and / or core team members, that 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 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 SRs 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*.*

OrganisationADD’s costs for REAs 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. *Usually, SRs synthesise experimental and quasi-experimental studies. However, depending on the research questions being asked and the type of literature available in a particular sector, SRs can go beyond randomized controlled trials (RCTs) and quasi-experimental designs (see the 3ie services page that describes some of this:* [*https://www.3ieimpact.org/services*](https://www.3ieimpact.org/services)*).* *Commissioning organisations should make sure to clarify what evidence and studies they want to focus on before production of the project Terms of Reference.* [↑](#footnote-ref-1)
2. *Note for commissioning organisation: please see the following 3ie protocol for some specific examples of research questions for an SR:* [*https://www.3ieimpact.org/sites/default/files/2021-12/Gender-SR-brief.pdf*](https://www.3ieimpact.org/sites/default/files/2021-12/Gender-SR-brief.pdf) [↑](#footnote-ref-2)
3. *Note for commissioning organisation: REAs typically have shorter timelines than SRs and therefore it may not be possible to answer all the example questions listed here in one project. Research questions should be prioritised before production of the project Terms of Reference.* [↑](#footnote-ref-3)
4. *Moderating variables affect the direction or strength of the relationship between two other variables. For example, in a systematic review assessing the impact of cash transfers on education outcomes, possible moderating variables that may affect the strength of this relationship could be the gender or age of participants. Mediating variables explain the how and why of a relationship between two variables and are sometimes called intermediate variables. They can be thought of as a part of the causal pathway that explains how a cash transfer programme influences education outcomes.*  [↑](#footnote-ref-4)
5. *An example of a systematic review protocol can be found* [*here*](https://onlinelibrary.wiley.com/doi/10.1002/cl2.1348)*.* [↑](#footnote-ref-5)
6. *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-6)
7. *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-7)