



What to include in an Evaluation Brief

Refer to the table to help you write an effective evaluation brief to commission an independent evaluation supplier. It provides a structure and guidance on what to include, and can be adapted to fit your particular needs.

Introduction	<p>Briefly introduce your organisation, your mission, and the project you’re evaluating.</p> <p>Summarise the scope, purpose and value of the brief, and any other topline information.</p>
Background to the project and evaluation	<p>Provide key information about the project, e.g.:</p> <ul style="list-style-type: none"> • How is it being funded? • How long will it run for? • Who is it aimed at? • How is it being delivered? • Where is it happening - one or more locations, nationally/certain areas? • What are the intended outcomes? • How does it contribute to your organisation’s mission? <p>Explain why you need the evaluation, how you plan to use the findings, and with whom. E.g.:</p> <ul style="list-style-type: none"> • To report to a funder • To understand and develop a new project • To influence stakeholders or attract future investment • To generate insight or support an organisational need <p>If useful, include further information, such as the project’s logic model, delivery timescales or targets.</p>
Evaluation objectives	<p>Set out your objectives for the evaluation – what do you want it to achieve? E.g.:</p> <ul style="list-style-type: none"> • Measuring the project’s impact on your selected outcomes • Assessing and learning from project delivery to refine your delivery model <p>Include any key themes or strategic priorities the evaluation should focus on, and any important definitions you should tell suppliers about – such as your outcome indicators.</p>
Method and approach	<p>Explain what you think the evaluation will involve and how it will be carried out. Think about:</p> <ul style="list-style-type: none"> • What types of evaluation will tell you what you want to know • Which tools you expect (or require) to be used: surveys, interviews, diaries etc • Which people or organisations will need to help you get this information <p>If you aren’t sure you can ask the supplier to suggest an approach. There will be time to refine and agree the final approach with your appointed supplier together.</p>

Deliverables	<p>List the essential outputs or materials you need from the evaluation such as:</p> <ul style="list-style-type: none"> • The final report and any interim reports • Recommendations (if desired) • Any datasets • A presentation • Any summaries or case studies that will help you use and share the findings. <p>If you ask suppliers to suggest outputs it might add value to their bid. Again, you can refine this list with your appointed supplier.</p>
Evaluation timing	<p>Set out the timings for the evaluation, including start-up meetings, fieldwork, reports etc. Think about:</p> <ul style="list-style-type: none"> • The need to gather baseline data before delivery starts • When you or your funder will need certain information or reports • Any seasonal factors that might affect the evaluation • Your delivery timetable
Budget	<p>What is your budget for the evaluation? Say whether it includes VAT.</p>
Assessment criteria and weightings	<p>Say how you will assess submissions to choose the successful supplier. Scoring each bid against criteria set out in the brief will enable suppliers to tailor their bids and help you to make the best choice.</p> <p>Step 1: Decide on your criteria for assessing bids</p> <p>You will usually be looking for a balance between the quality and cost of proposals.</p> <p>Examples of quality criteria include:</p> <ul style="list-style-type: none"> • Industry knowledge – Knowledge, understanding and experience of working in the relevant sector • Approach and methods – Suitability of the proposed approach and methods • Deliverables – Format, content and quality of reporting and outputs • Project management – Appropriate project management systems, including sufficient capacity and resources, ability to meet deadlines, and risk mitigation <p>Cost is the price and perceived value for money of each application. The cheapest bid may not score the highest if it clearly represents worse value for money compared to another. <i>(Sport England colleagues should use our standard process for commercial assessment.)</i></p> <p>Step 2: Decide how important each criteria is</p> <p>A standard way to show importance is by 'weighting' – assigning percentages of the total to each of the criteria. The weights should add up to 100%, so if you had 5 equally important criteria each would count for 20%, but you will often have some that are more important than others.</p> <p>The option of an interview stage</p> <p>You may include the option to invite the highest-scoring suppliers to an interview to help you identify the best match for your needs. Tell suppliers about the date and format of any interviews.</p>

Tender process	<p>Tell suppliers how to apply:</p> <ul style="list-style-type: none"> • What should they include in their submission? Is there a word count or page limit? • Who should they send it to, how, and by when? • Can suppliers ask clarification questions about your brief and your requirements? If so, tell them how this will work and how you will respond. (It is usually fairest to share responses to all questions with all interested suppliers.) 																		
Timetable	<p>Set out the key dates relating to the procurement process – here is an example of what to include:</p> <table border="1" data-bbox="311 562 1292 1041"> <thead> <tr> <th data-bbox="311 562 487 617">DATE</th> <th data-bbox="487 562 1292 617">STAGE</th> </tr> </thead> <tbody> <tr> <td data-bbox="311 617 487 669"></td> <td data-bbox="487 617 1292 669">Date the Brief issued</td> </tr> <tr> <td data-bbox="311 669 487 722"></td> <td data-bbox="487 669 1292 722">Deadline for clarification questions</td> </tr> <tr> <td data-bbox="311 722 487 774"></td> <td data-bbox="487 722 1292 774">Deadline for suppliers to submit a bid</td> </tr> <tr> <td data-bbox="311 774 487 827"></td> <td data-bbox="487 774 1292 827">When you will assess bids</td> </tr> <tr> <td data-bbox="311 827 487 879"></td> <td data-bbox="487 827 1292 879">When you will notify shortlisted suppliers</td> </tr> <tr> <td data-bbox="311 879 487 932"></td> <td data-bbox="487 879 1292 932">When you plan to hold interviews</td> </tr> <tr> <td data-bbox="311 932 487 984"></td> <td data-bbox="487 932 1292 984">When you will contact the successful supplier</td> </tr> <tr> <td data-bbox="311 984 487 1037"></td> <td data-bbox="487 984 1292 1037">When you would like to hold the Inception meeting</td> </tr> </tbody> </table>	DATE	STAGE		Date the Brief issued		Deadline for clarification questions		Deadline for suppliers to submit a bid		When you will assess bids		When you will notify shortlisted suppliers		When you plan to hold interviews		When you will contact the successful supplier		When you would like to hold the Inception meeting
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Contact	<p>Provide contact details of the person(s) managing the procurement.</p>																		
Appendices	<p>Include any other useful but non-essential information in the appendix. If you provide hyperlinks or embedded documents, remember to check that they work.</p>																		