

Versions Issued

Version No.	Date	Description of Amendment	Approved by:
1.0	1 June 2024	Creation of Methodology	SEG Board
1.1	18 February 2026	Review of governance and new ISEAL Code references	A.Kerr, Chairman

1. Background and purpose

This document sets out the terms of reference for evaluation reports; for internal reports and those commissioned to independent parties.

2. Specifications

In commissioning reports, SEG shall set criteria for the following:

2.1 Title, purpose and objectives

To provide clarity on the purpose of the report.

2.2 Content

To identify the contents expected, relevant to the report, for example, but not necessarily or exclusively:

- Title
- Purpose
- Objectives
- Version, date and approval
- Background to the commissioning (e.g. who, how, why, Declarations of Interest)
- What part of SEG's Monitoring, Evaluation and Learning (MEL) plan this links to and aims to evaluate
- Introduction / background
- Method
- Results
- Discussion
- Conclusions
- Recommendations
- References
- Appendices
- Diagrams

2.3 Reference material

- 2.3.1 SEG shall provide references, source materials and contacts for those commissioned to draw upon and suggest other potential sources of information.
- 2.3.2 It is important, however, particularly for independent evaluation reports by third parties, to be able to identify and draw information from sources from their own independent research.

2.4 ISEAL Code of Good Practice

Reports shall be required to address the following criteria, if not already identified above, specifically intended to comply with the ISEAL Code of Good Practice:

2.4.1 ISEAL Code References

- 5.2:** *'At least some of the MEL activities and published outputs consider causality by employing methodologies that help to assess the extent to which observed changes are attributable to the scheme'.*
- 5.3:** *'MEL activities it implements or commissions produce accurate, reliable, and relevant findings', and this includes:*
- 'defining the specific research and learning question(s) to be answered through each MEL activity', and*
- 'ensuring that each published MEL output includes a clear description of both positive and negative findings, the methodology and data sources behind the analysis, any possible limitations to the analysis, and any recommendations for improvement'.*

2.4.2 Report Criteria (these are taken from the previous ISEAL Impacts Code)

Criteria
<p><u>The report shall cover:</u></p> <ol style="list-style-type: none">Is the standards system (i.e. SEG) intervention producing the desired or intended sustainability outcomes or impacts?What unintended effects (positive or negative) resulted from the activities or intervention assessed?To what extent is it possible to attribute the observed effects to the activity or intervention of the standards system (i.e. SEG) using the methodology applied in this evaluation?What factors could have influenced the results (factors within the control of the standards system and other external factors)?
<p><u>The report shall include:</u></p> <ol style="list-style-type: none">The purpose of the evaluation or analysis and the guiding evaluation questions.Names of people involved in conducting the evaluation, their qualifications, and their connection to the entity or system being evaluated.Methodology (e.g. what data was collected; specific methods used to gather data; thresholds employed; sampling; data manipulation; how data was analysed and conclusions drawn).Findings and conclusions, including both positive and negative effects.Any limitations of the evaluation or analysis (including limitations or uncertainties in the data, and assumptions).How the context (e.g. internal and external factors) might have affected the results of the intervention.Recommendations, where appropriate.

2.5 Commissioning and contract / agreement

2.5.1 SEG shall commission report authors as it sees fit according to the circumstances. Sometimes a recognised specialist may be approached and agreement made. Sometimes a tender process sent to 2 – 5 potential authors may be adopted. The latter is more relevant to apply to independent evaluation reports.

2.5.2 Included in the commissioning process shall be:

- Introduction / background to the study, to provide sufficient context for the commissioned author,
- The specifications for the report (see 2.2 – 2.4 above),
- Quality & performance criteria for the report , e.g. :
 - expected approx. length,
 - meeting of milestones (e.g. draft report submission date, final report submission),
 - Data protection requirements,
 - Non disclosure aspects.
- Impacts of not meeting those quality criteria – e.g. a reduced fee if not delivered on time,
- Provision of details of how to apply and a contact to gain further information,
- Describing what shall be included in Proposals from interested parties, to include:
 - details of relevant previous work, experience, who would be involved, the proposed schedule, costs, methodologies that would be used. Expected length of proposals, plus annexes with e.g. CVs.
- How the advertising for the work shall be publicised / distributed.

2.5.3 The SEG Board shall delegate the development of contracts and the commissioning of reports to the MEL team but shall approve final contracts and expenditure.

3. Review

These Terms of Reference shall be reviewed after 2 years or sooner if circumstances deem it necessary.