

WRITING TERMS OF REFERENCE FOR RESEARCH

WHY IS THIS IMPORTANT?

Oxfam strives to base its policy and programme work on good quality research. Each year we devote significant resources to undertaking and commissioning research that will support and help to improve our work and that of our partners. Are we getting value for money in the research produced? The clarity of the Terms of Reference (TOR) given to the researcher(s) is one of the most important factors determining the quality of a piece of research. This guideline outlines how to write clear and effective TOR. It is organised to parallel the sections of our [Terms of Reference for Research Template](#) and can be used as a guide to completing that document. It should also be used in conjunction with Oxfam's Research for Influencing Diagram and our guideline on [Integrating Research in Gender Planning](#).

TITLE BOX

Add the title of your research and your name (as TOR author), and keep the date and draft number current as you make revisions.

KEYWORDS

List no more than six key words. These can refer to the research issue/topic, the geographic location(s) that the research will cover, methods, or analytical approach.

MAIN TEXT

1. Purpose and background

- Briefly outline the purpose of the research, including how it will address gender issues.
- Describe the broader project/programme/campaign that this fits into.
- Explain briefly what this research is about, its current relevance, and why this issue matters to Oxfam. What is at stake? Why now?
- Remember that the researcher may be new to Oxfam's programmes/campaigns. Don't use jargon or acronyms when explaining the background context.

- Don't write too much background information here, i.e. keep it to 2-3 paragraphs maximum. The focus of this document is the new research to be commissioned. You can always give the researcher more background information separately.
- If there is other ongoing research for the same project, make this clear. You could provide the TORs of related research in an annex, so that your researcher knows how their work fits in.

2. Audience and use

- Describe who will be the audience(s) for the research and for the work that it will generate.
- Explain briefly how the findings will be used. Will they be published directly or used as background for a larger Oxfam report? This will clarify for the researcher the kind of information we need.
- Summarise the kind of written and/or other outputs required (reports, presentations, other media) and provide further detail in the relevant sections below.

3. Research objectives

- Concisely state the primary goal of this research (what you aim to get out of it).
- Then set out 3-6 specific objectives following on from it. Writing clear objectives is key to designing good quality research. It is very common to write far too many objectives, in the hope of learning a great deal about many topics. This is likely to produce scattered research, focused on what the researcher knows best, not what you want to know most. In order to ensure the best possible research, think through the following steps:
 - What is this research for? Why do you need this new information? What will it be used for? Where, then, should the focus be?
 - What is the theory of change of the research and how will it have impact?
 - What thesis or working hypothesis does the research address? Make the working assumptions explicit.
 - How will the research address the relevant gender issues?
 - Don't start from scratch. You probably already have a lot of background information about the research topic. It's best to do a literature review first so you know what is already out there, and are not simply repeating it (see our guideline on [Reviewing the Existing Literature](#)). What are the key gaps in knowledge and evidence? Are you trying to fill these in? Are you trying to update old data? Share your literature review or other documents with the researcher and focus on what needs to be added. Sometimes, you may want the researcher to carry out the literature review; if so, be sure to share the guidelines.

- Clarify the objectives. Are they as specific, focused and clearly written as possible? Ask a colleague to read them and then tell you what they think the objectives are asking for. Remember not to use jargon or acronyms.
- Prioritise the objectives. Make it clear in your document which objectives are most important and so should be covered in most detail.

4. Research questions

The research questions flow out of the objectives and are the main questions that you want the researcher to answer. If possible, aim for no more than three main questions and if necessary break them down into sub-questions.

- Focus on a few key questions or topics—if you ask too many, they will not all get answered.
- Consider structuring your list of questions in an order similar to the way you want the researcher's report to be structured because this will help to clarify what you expect to see in the report (you can also discuss and agree on an outline for the report with the researcher).
- Discuss and clarify with the researcher which of these questions is top priority and which are background—this is the most important part of the TOR.
- Oxfam aims to mainstream gender issues in its programmes and campaigns, so ensure that the researcher is aware that she or he should take a gendered perspective in the research.

5. Framework and approach

What is the conceptual framework of the research and what assumptions does it make? Is it sufficiently gendered? Does it follow a tried and tested analytical approach? Is it different from previous research on this topic or innovative in some way?

6. Gender

Consider how transformative you want your approach to be. Most research falls somewhere on a scale that runs from gender aware, to gender transformative, though we sometimes run the risk of falling into the trap of gender-blind research by failing to acknowledge or question gender issues. We should not undertake or publish any research that is gender-blind.

Gender Research Rubric	
<i>Gender-blind</i>	Gender (the differentiated and intersectional experiences of women, men, and gender diverse groups) is <i>not</i> considered in the research project; not even in its conceptualization or its rationale.
<i>Gender-aware</i>	Gender is considered in the research project's rationale, but is not an operative concept in the design and methodology.

<i>Gender-sensitive</i>	Gender is considered in the research project's rationale, project design and methodology. Data is disaggregated by gender, and gender is also considered in the composition of the research team and reviewers. Gender-sensitive research does not (yet) extend to analysis and action to address gender inequalities.
<i>Gender-responsive</i>	Gender is considered in the research project's rationale, design, and methodology and is rigorously analysed with a view to inform implementation, communication, and influencing strategies. Gender-responsive research does not (yet) address the underlying structural factors such as norms and power relations that contribute to gender inequalities.
<i>Gender-transformative</i>	Examines, analyses, and builds an evidence base to inform long-term practical changes in structural gender power relations and norms, roles and inequalities. Gender-transformative research should lead to sustained change through action (e.g. partnerships, outreach, and interventions, particularly with women's rights organizations).

Use the criteria in the table to assess where your research will be located. Note that you are building on the criteria as you move from gender-aware to gender-responsive so the rubric needs to be worked through from the beginning each time. For further explanation and a more detailed checklist please see our guideline on [Integrating Research in Gender Planning](#).

7. Research methods

It is a good idea to discuss research methods for collecting data with the researcher and document the following:

- The kind of methodology you want them to use, including qualitative, quantitative, participatory, and audio-visual methods as appropriate. For example, are you expecting interviews with key informants or a statistically significant survey of hundreds of people?
- Indicate whether and how the method(s) will be gendered.
- State also where research will be undertaken, or whether it is desk-based.
- Note any interviews or case studies that the researcher must include in the process. For example, make sure you brief the researcher well on gathering 'human stories' if that is part of the task (see our guideline on [Researching Human Interest Stories](#)).
- If there are other researchers doing related studies, then the research teams should meet early in the process, then again at the first draft stage, to learn from each other and make their work coherent. Write this into the TOR as part of the process they must follow.
- If there are specific data you want them to collect, it is a good idea to draw up a table for them to fill in (for example, a table documenting labour rights under national law in one column and then the reality of labour practices in the next column).

8. Key sources

If relevant, list important sources and people that the researcher(s) should consult. Get the researcher off to a good start by listing:

- Key Oxfam documents, e.g. background reports or earlier research;
- Key external documents that are essential reading;
- Oxfam staff and contacts who would be important sources of information; and
- Other obvious key informants who should be interviewed as part of the research process, to whom Oxfam could provide an introduction.

9. Research products

Specify the research products, such as the style and length of written reports and/or audio-visual outputs. If the research is going to be written up into a report, clarify the expected style—this is especially important if it is going to be made public.

- Should it be technical and for an expert audience? Or accessible to an educated lay reader?
- Researchers know that Oxfam does advocacy and so sometimes write up their research in an advocacy style, with lots of rhetoric, but this is rarely what we want from them. Make it clear that the style should be factual, and emphasise the importance of documenting all sources used (see Section 14 below).
- It is not essential to specify a target length for the report, but it may be useful especially if you don't want the report to be too long or too short. If you decide to define the length of the report, it's best to specify the number of words, rather than the number of pages, because of graphs, different page spacing, etc. (As a rough guide, one A4 page, single-spaced is around 480 words).
- It's a good idea to discuss the expected lengths of different sections with the researcher, to clarify where you expect most detail to be.
- Consultant will write according to the Oxfam [Style Guide for References, Notes, and Bibliographies](#) if stipulated.
- If you've asked for the research to be presented in other formats or media, then provide similar directions about style, length, and other relevant parameters.
- Work must undergo a review process that includes internal Oxfam review and independent external peer review.

10. Timetable

- Outputs depend on the project: they may include initial notes, first drafts, final drafts, supplementary notes, data analysis, consultations, presentations, etc.

- Don't try to squeeze the research into too little time. A heavy time squeeze usually results in poor quality research. Discuss with the researcher how much time is realistically needed, so it can be agreed on by both sides.
- Remember to plan in enough time for Oxfam staff and partners to read and comment on drafts: two weeks is usually realistic. Commit to a date on which you will give Oxfam's comments on the first draft back to the researcher.
- When setting dates, be specific. 'October 2012', for example, could mean the 1st or the 31st of October, and so creates a lot of misunderstanding.
- Commissioned researchers too often lose some of their allotted time because Oxfam takes longer than expected to approve their contract. So the timetable must be checked and revised once the TOR is actually approved and research has begun.
- Remember to plan in enough time between the delivery of the final piece of research and publication (if the research is going to be published). This time may be needed for formatting and design, printing and distribution, publicity, etc.
- Consultant is expected to make deadlines outlined above, unless the consultant negotiates alternative deadlines with Oxfam, in which case Oxfam will revise the TOR to express the new deadlines.

The table below provides guidance for developing a timeline:

Drafting, peer review, and indicative sign-off schedule

Stage	Guidance
Peer review of draft TOR complete	<i>Usually 1 week</i>
Revised TOR submitted for sign-off	<i>Date to be provided by Research Project Manager—usually 2-10 days following peer review</i>
Sign off of TOR complete	<i>Usually 5 days</i>
1 st draft research submitted to peer review and sign-off	<i>Date to be provided by Research Project Manager—at least 1 month for desk research, 3 months for field research per country, and at least 7 days to write draft findings</i>
Peer review of draft research complete	<i>Recommendation that each peer reviewer (internal and external) receive 2 weeks</i>
Revised draft submitted to for sign-off	<i>Date to be provided by Research Project Manager—usually 5-15 days following review</i>
Sign off of research complete	<i>Usually 5-10 days</i>

11. Documentation

It's very important to be clear with researchers about the need to document sources because unsourced information is a common problem in the research we commission. If Oxfam cannot trace the source of a statistic or quote, we can't use it in our public work, so it's important for Oxfam to have the full information and documentation to substantiate it.

- Discuss with the researcher how they will submit to you all the background sources needed. Will they give you electronic copies of the documents?
- If ownership and/or access to this and other additional material (e.g. field notes and recordings, survey data) is important, then make sure that this is specified in the TOR and/or contract with the researcher.
- Primary sources must be used wherever possible over secondary sources (for example, the consultant should provide documentary evidence of a fact or statistic as written in their original report, not as cited by a newspaper)
- If internet sources have been used, a printed page from the website showing the cited facts and statistics must be submitted. The consultant must ensure that the date on which it was printed out is written on the page.
- If Oxfam discovers any discrepancies with the figures or facts, the consultant will work with Oxfam to resolve the discrepancies.

12. Ethics and risks

State any specific or possible ethical issues that the research raises, as well as any risks that might arise during or as the result of the research. Suggest a process for mitigating any such issues/risks, or indicate that this must be discussed further once the TOR is agreed upon. Refer to guidance and procedures for working with vulnerable women and children where appropriate. Provide the researcher with a copy of Oxfam's ethical guidelines: [Undertaking research with ethics](#). These set out the minimum ethical standards required to be met by all research conducted by or for Oxfam, and so must be read by the consultant and referenced in the TOR.

13. Research management

Research Project Manager: Who will manage the research for Oxfam and how? Who is the primary point of contact? Provide contact information.

Researcher(s): List internal and external researchers as appropriate, recognizing that the research project manager may be the researcher or part of a research team. If an external researcher, also list her/his primary affiliation and provide contact information.

- List any essential qualifications or experience required in order to carry out this work.
- Don't create a wish list, but focus on 'must-haves'. These might include: experience with research methods; language skills; familiarity with a country or context; disciplinary approach (such as anthropology or economics).

Client(s): List the internal Oxfam client(s) for this research.

14. Budget

Detailed breakdown of consultant fees, travel, field research expenses, etc., as applicable.

15. Additional guidelines

Oxfam Research Guidelines

<http://policy-practice.oxfam.org.uk/our-approach/research/research-guidelines>.

LINKS

All links last accessed March 2019.

Terms of Reference for Research Template:<https://policy-practice.oxfam.org.uk/publications/terms-of-reference-for-research-template-253035>

Research for Influencing Diagram:
<https://policy-practice.oxfam.org.uk/publications/planning-research-for-influencing-diagram-620756>

Integrating Research in Gender Planning
<https://policy-practice.oxfam.org.uk/publications/integrating-gender-in-research-planning-620621>

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