



# Evaluation Statement of Work Checklist

The Evaluation Statement of Work (SOW) Checklist is intended to strengthen a SOW during the evaluation planning stage. Use the checklist to “rough out” the SOW, and add detail as the start date for the evaluation gets closer. The 15 items below are important factors that should be considered in early drafts of the SOW. All factors should be adequately addressed (with a rating of three or higher) in the final version of the SOW. One of the most critical factors is to ensure that the relationship between the number of evaluation questions, level of effort, and budget for the evaluation is clear and realistic.

## EVALUATION STATEMENT OF WORK CHECKLIST

**Effort to be evaluated:** \_\_\_\_\_

**Main Implementer(s):** \_\_\_\_\_

**Reviewer:** \_\_\_\_\_

**Date of Review:** \_\_\_\_\_

SOW Elements and Sub-Elements	How Well is the SOW Element Addressed?					Issues Noted by SOW Reviewer
	1	2	3	4	5	
Key: 1= element was not covered at all in SOW, 2= At least one key aspect was not covered, 3= All aspects were covered at a basic level	4= Covered all aspects and went beyond basics in at least one way that is likely to help evaluators					5 = All aspects were covered thoroughly and completely, going beyond, in all ways.
<b>Identify the activity, project, or program to be evaluated</b>						

1. Is the SOW clear and specific about what is to be evaluated: activity/project/program (identified by name and relevant office/bureau); funding; sector/topic; budget; target group?	1	2	3	4	5	
<b>Provide a brief background on the intervention’s hypothesis and its implementation</b>						
2. Does the SOW clearly describe the nature of the intervention, i.e., what DoS intended to deliver (training, grant, etc.) and what was expected to change (at the output and especially the outcome levels)?	1	2	3	4	5	

SOW Elements and Sub-Elements	How Well is the SOW Element Addressed?					Issues Noted by SOW Reviewer
	1	2	3	4	5	
<b>Identify existing data sources</b>						
3. Is the SOW clear and specific about existing activity/project/program monitoring data and available reports (i.e., indicators tracked, baseline data, targets, progress toward targets; narrative quarterly/annual reports) and when / how evaluators can access these data sources?	1	2	3	4	5	

<b>State the purpose of, audience for, and use of evaluation</b>						
4. Is the SOW clear and specific about why, in management terms, the evaluation is being conducted, i.e., which management decisions an evaluation at this time will inform?	1	2	3	4	5	
5. Does the SOW indicate who comprises the specific users of the evaluation, i.e., what types of managers in which entities (e.g., DoS, implementing partner, host, government, other donors, etc.) are expected to use the evaluation and how?	1	2	3	4	5	

<b>Clarify the evaluation question(s)</b>						
6. Does the SOW include a list of the specific questions the evaluation team is expected to answer? Is the list consistent with DoS expectations about limiting the number of questions asked?	1	2	3	4	5	Number of questions in SOW [count question marks]:__
7. Does the evaluation address the most important and relevant questions about project performance?	1	2	3	4	5	

SOW Elements and Sub-Elements	How Well is the SOW Element Addressed?					Issues Noted by SOW Reviewer
	1	2	3	4	5	
8. Do the evaluation questions appear to be consistent and supportive of the evaluation's purpose?						
<b>Identify the evaluation methods</b>						

9. Is the SOW clear and specific about any data disaggregation (e.g., gender, geographic region, etc.) it requires?						
<b>Specify evaluation deliverable(s) and timeline</b>						
10. Are the deliverables for which the evaluation team is responsible clearly specified in the SOW, with deadlines when applicable?						

<b>Discuss evaluation team composition and participation of customers and partners</b>						
11. Is the SOW clear about the evaluation team composition (one member should be an evaluation specialist), and about whether and how DoS expects its staff, partners, customers/beneficiaries, or other stakeholders to participate in the evaluation process (i.e. developing the SOW, collecting/analyzing data, or providing recommendations)?						
<b>Cover scheduling and logistics</b>						

SOW Elements and Sub-Elements	How Well is the SOW Element Addressed?					Issues Noted by SOW Reviewer
	1	2	3	4	5	
12. Is the SOW clear and specific about any dates that need to be reflected in the evaluation team's plan (e.g., local holidays, specific dates for oral presentations, etc.)?						
<b>Clarify requirements for reporting</b>						

13. Is the SOW clear about requirements and timelines for any presentations, the draft report, and the final report?						
<b>Include Level of Effort (LOE) and budget guidelines</b>						
14. Is the SOW clear about the LOE and budget available for the evaluation?						

<b>Reviewer Sense of Reasonableness</b>						
15. In the SOW reviewer's judgement, is the relationship between the number of evaluation questions, timeline, and budget for this evaluation clear and reasonable?						
				Yes		
				No		
				Insufficient Information		

