ANNEX

TERMS OF REFERENCE

Title of Assignment: Evaluation of the Performance of WIPO Standing Committees

Name of unit/sector: Evaluation Section, Internal Oversight Division

Place of Assignment: Home-based

Expected places of travel (if applicable): Geneva, Switzerland

Expected duration of assignment: October 9, 2020, to February 28, 2021

Application deadline: September 29, 2020

1. The objective of the assignment

1. IOD has foreseen contracting one evaluation expert (consultant) for 50 working days distributed between October 2020 and February 28, 2021. The selected expert will assist in the Evaluation of the Performance of the WIPO Standing Committees in collaboration with the Evaluation Section task manager, as defined in this ToR and the evaluation TOR.

2. Deliverables/services

(a) Deliverable 1: Evaluation ToRs

2. The consultant will support the preparation of the ToRs under the guidance of the IOD Evaluation Section ensuring ample participation of the variety of stakeholders and credibility of the evaluation exercise. The ToRs will follow IOD templates and will be drafted in accordance with UNEG quality standards.

(a) Deliverable 2: An inception report

3. The consultant will prepare the inception report under the guidance of the IOD Evaluation Section. It should summarize the desk review, monitoring data, define the theory of change evaluation framework, and specify the evaluation methodology, detailed evaluation question matrix, list of stakeholders, sampling strategy, data collection instruments including interview protocols and survey templates for internal staff and external stakeholders.

4. As part of this phase, the evaluator will organize and undertake the preliminary interviews with WIPO staff and make the necessary arrangements for engaging external stakeholders in the evaluation process.
(a) **Deliverable 3: Draft evaluation report**

5. The evaluation expert will prepare a full-fledged draft report, based on a through analysis and triangulation of appropriate sources and the use of the relevant evaluation methods. These methods will include data collection tools such as online/telephone interviews, online workshops, etc. The consultant will need to provide all written interview records and stakeholders’ survey analysis to IOD Evaluation Section.

6. The evaluation expert will assist in the report edition, including the development of infographics for the report and presentations, which should be delivered following IOD Evaluation Section standards and by making use of modern report preparation tools. The draft report will follow the normative standards of the UNEG Quality Checklist for Evaluation Reports and IOD Evaluation Section evaluation report template. The evaluator will combine quantitative and qualitative research methods.

7. The consultant will be in charge of preparing, distributing, and analyzing surveys and interview protocols, among other data collection tools. He/She will be responsible for arranging meetings for interviews, data gathering, and analysis.

(c) **Deliverable 4: Final evaluation report**

8. The consultant will prepare a full-fledged draft evaluation report. He/she will follow the UNEG Quality Checklist for Evaluation Report\(^1\), the guidance of the IOD Evaluation Section, and make use of IOD Evaluation Section report templates.

9. The final report should include visuals whenever possible across the report and the following elements:

(a) Executive summary including infographic

(b) Introduction of the evaluation, description of the thematic, scope, and description of the methodology.

(c) The report should respond to the questions, as defined in the ToRs, according to evaluation criteria. Moreover, each section of the report should include conclusions and actionable recommendations drawn from the assessment of the findings.

(d) A matrix of clearly linked findings, conclusions, and actionable recommendations following the evaluation criteria as per ToRs.

10. All deliverables must comply with the UNEG Quality Checklist for Evaluation Report\(^2\), the IOD Evaluation Section report template, the United Nations Evaluation Group Norms and Standards\(^3\), and IOD Evaluation Section guidance documents.

11. All evaluation assessments must be supported by facts and findings, direct or indirect evidence, and well-substantiated logic. The proposed recommendations must be supported by the findings and be relevant, specific, realistic, actionable, and time-bound.

12. Depending on the evaluation process, the task manager might assign the consultant with other relevant tasks during the design and implementation of this evaluation. All evaluation products will be issued in English.

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\(^1\) [http://uneval.org/document/detail/607](http://uneval.org/document/detail/607)
\(^3\) [http://uneval.org/document/detail/1914](http://uneval.org/document/detail/1914)
3. Description of duties

13. The contracted consultant reports to the IOD Evaluation Section task manager. The consultant is responsible for the evaluation design, data collection, analysis, preparation of ToRs, report visuals, including infographics and reporting as provided in the agreed ToRs. The consultant will submit a copy of the edited final report to the IOD Evaluation Section.

14. The consultant shall in line with the UNEG Ethical Guidelines and her/his capacity and not as a representative of any government or organization that may present a conflict of interest. She/he will have no previous experience working with the initiative or of working in any capacity linked with it.

15. The consultant will integrate gender aspects across the evaluation report and whenever possible, including in surveys and interview protocols. In case of difficulties, uncertainties, or concerns in the conduct of the evaluation, the consultant needs to report immediately to the IOD Evaluation Section task manager and the Head of the Evaluation Section to seek guidance or clarification.

16. It will be the responsibility of the Program Managers and the Evaluation Section to ensure management engagement throughout the process and timely feedback in the quality assurance and factual clarification on the draft and final reports.

4. Reporting

17. The consultant will submit the final TOR for the evaluation by October 20, 2020.

18. The consultant will submit the inception report by October 30, 2020.

19. The consultants will present the preliminary findings, conclusions, and recommendations to the IOD Evaluation Section and management by January 18, 2020, and before submission of the draft report.

20. The first draft report should be presented to the evaluation section and relevant stakeholders for quality assurance and factual corrections at least three weeks before the deadline for the submission of the final report by February 26, 2020. The consultant will revise the report following IOD comments. IOD will share the revised draft report with Program managers (PMs) for comments by February 4, 2020, and the consultant will review it following the PM's comments. IOD will assess the quality of the evaluation report, and the final evaluation report will be issued.

21. The deadline for submission of the final report will be February 26, 2020.

22. The contract concludes, and payment is issued upon satisfactory receipt of deliverables, as per this ToRs, evaluation ToRs and outputs as described above.

5. Profile

23. The selected consultant shall have the following expertise:

   (a) Education: Advanced university degree in evaluation desirable, alternatively social, economics, development studies, social science, or related field.

   (b) At least ten years of experience in conducting evaluations including policy level evaluations, especially evaluations of committees and decision making bodies.
(c) Experience in policy and governing bodies evaluations, and for international agencies and national government institutions.

(d) Sound understanding of the complexity of normative decision-making process within the United Nations and political implications.

(e) Demonstrated knowledge in gender mainstreaming in decision-making bodies is desirable.

(f) Experience in quantitative and qualitative evaluations.

(g) Ability to conceptualize, analyze, and draw evidence-based findings, conclusions, and recommendations.

(h) Excellent communication, writing, editing and report presentation skills including experience with data visualization, infographics, and other visual aid are essential.

(i) Fluency in oral and written English. Fluency in oral and written French is desirable but not necessary.

6. **Condition of service**

24. The consultant will serve under the contract for the services of an individual contractor as detailed in the applicable WIPO rules and regulations. WIPO is entitled to all intellectual and other property rights deriving from this exercise.

7. **Duration of contract and payment**

25. The total duration of the evaluation is equivalent to 50 working days and will take place between October 9, 2020, and February 28, 2021.

<table>
<thead>
<tr>
<th>Activity</th>
<th>Days</th>
</tr>
</thead>
<tbody>
<tr>
<td>ToRs preparation and consultation process</td>
<td>5</td>
</tr>
<tr>
<td>Desk research and study of relevant documentation</td>
<td>5</td>
</tr>
<tr>
<td>Preparation of data collection tools and inception report</td>
<td>6</td>
</tr>
<tr>
<td>Interviews with WIPO staff and collaborators</td>
<td>3</td>
</tr>
<tr>
<td>Interviews inter-alia with external stakeholders including Geneva-based Permanent Missions, selected Intellectual Property Offices, beneficiaries of WIPO’s initiatives</td>
<td>14</td>
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<tr>
<td>Data analysis for draft report writing</td>
<td>8</td>
</tr>
<tr>
<td>Preparation and presentation of findings, conclusions and recommendations</td>
<td>2</td>
</tr>
<tr>
<td>Revision of report based on comments provided by the ES and Management</td>
<td>2</td>
</tr>
<tr>
<td>Final report writing</td>
<td>5</td>
</tr>
</tbody>
</table>
26. The consultant's fee will be paid in line with the following schedule and upon acceptance (part of the quality assurance process) by the Evaluation Section and Director IOD of the deliverables and outputs mentioned in the ToRs.

   (a) Upon acceptance of the Inception report: 20%
   (b) Upon approval of the draft report: 40%
   (c) Upon approval of the final evaluation report: 40%

Subject to COVID 19 pandemic restrictions, for consultants outside Geneva, the evaluation section will cover a maximum of two airfares to Geneva. However, this will depend on whether travel would be allowed by the Swiss authorities during the evaluation period. Considering the existing situation is most likely that the whole evaluation process will have to be done remotely.

8. How to apply?

27. Interested applicants are required to send the following documents to julia.engelhardt@wipo.int and adan.ruizvillalba@wipo.int:

   (a) Detailed CV with the name of two references (we will only contact the references of the final candidate);
   (b) Indicate daily consultant's fee rate;
   (c) A sample of two recent policy level evaluation reports authored by the applicant.

This is a home-based consultancy assignment.

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