WRITING TERMS OF REFERENCE FOR RESEARCH

WHY MASTER THIS SKILL?

Oxfam strives to base its programmes 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. These guidelines and the accompanying template present a format for writing a clear and effective TOR.

The following sections mirror those in the Terms of Reference for Research template and should be used as a guide to completing this document.

Title box

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

1. Background and rationale

- Describe the broader programme/campaign that this fits into.
- Explain briefly what this research is about 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 of findings

- Describe who will be the audience for the research and explain briefly how the findings will be used. Will they be published directly or used as background for a larger Oxfam report?
  - Make it clear how the research will be used – 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 objective 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?

- **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 (for more on this see Oxfam’s guidelines on reviewing existing literature). Are you trying to fill in key gaps? 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.

- **Clarify the objectives.** Are they as specific, focused and clearly written as possible? Ask another 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.

- 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 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 and HIV/AIDS issues in its programmes and campaigns, so ensure that the researcher is aware that they should take a gendered perspective and raise any relevant HIV/AIDS concerns in the research.

5. Suggested research methods

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

- The kind of methodology you want them to use – e.g. are you expecting interviews with key informants or a statistically significant survey of hundreds of people?

- Any interviews or case studies that they 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 guidelines on creating human-interest case studies for more information on this).

- 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 is specific data you want them to collect, it is a good idea to draw up a table for them to fill in (one example would be a table documenting labour rights under national law in one column and then the reality of labour practices in the next column).
6. Ethics and risk

- State any specific or possible ethical issues that the research raises and provide the researcher with a copy of Oxfam’s ethical guidelines (included in the TOR for Research template).
- State any risks that might arise during or as a result of the research and suggest a process for mitigating them (or indicate that this must be discussed further once the TOR is agreed).

7. Key sources and people to be consulted

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;
- Other obvious key informants who should be interviewed as part of the research process, to whom Oxfam could provide an introduction.

8. Style and length of report / research products

- 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 12 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.
- 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.

9. 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.

10. Research management
• State who will be responsible for managing the research process – the primary point of contact. If the commissioning manager is a different person, state also who this is.

11. Qualifications and experience required
• 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).

12. Avoiding libel in research
It is essential for all researchers to avoid libel in producing research, and the guidelines included in this section of the TOR template must be read by every researcher or consultant. You don’t need to make any change to them in the TOR.

13. Ensuring research with ethics
This section in the TOR template sets 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. You don’t need to make any changes to it in the TOR.

14. Documentation of research
• 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 to document it well.
• Discuss with the researcher how they will submit to you all the background sources needed. Will they give you electronic copies of the documents? Or photocopies of web pages in a file?
• 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.
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This guideline and the accompanying template have been prepared by Oxfam’s Global Research Team and Oxfam GB’s Policy and Practice Communications Team for use by staff, partners, and other development practitioners and researchers. They were originally written by Kate Raworth and have been revised and updated by John Magrath and Martin Walsh.

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