

## Evaluation Scope of Work Template

### PURPOSE

This document is provided as a general guide and sample resource to support organizations in developing evaluation service scopes of work. It is intended for informational and capacity-building purposes only and does not constitute legal advice.

### Use Case

- ▶ **Use case 1:** You are an independent consultant providing evaluation services and can use this template to format your scopes and proposals.
- ▶ **Use case 2:** You need evaluation services that require you to seek external support, either through an independent consultant or through an evaluation firm. This template can be provided to the individual or organization to complete.



## ABOUT BSRI

BSRI was created to support informed and effective decision-making for our partners with tools, resources, and data for action. As we wind down operations, we are creating these resources for the community to continue the work. We use our guiding principles in engaging with partners and communities, putting people first through accountability and reciprocity, communicating transparently, and sharing our knowledge widely.

## ABOUT THIS DOCUMENT

BSRI developed this template to help organizations clearly define their evaluation needs when engaging external consultants. Our experience is that a well-defined scope of work sets the tone for a successful partnership by aligning expectations, clarifying roles, and ensuring the work is meaningful and actionable. This tool is designed to bring structure and confidence to that process, so organizations can move forward with clarity.

## USE OF ARTIFICIAL INTELLIGENCE (AI)

Our organization utilizes artificial intelligence (AI) tools to enhance efficiency, support data analysis, and strengthen evaluation practices. We also encourage our partners and clients to thoughtfully explore AI as a means to build future-ready evaluation capacity. All AI use is governed by strict data privacy and ethical standards. We do not input any personally identifiable information (PII), protected health information (PHI), or other sensitive data into AI systems in a manner that would violate HIPAA or other applicable privacy regulations. Additionally, we exclusively use licensed AI tools and platforms that explicitly prohibit the use of submitted data for model training or retention beyond the scope of the intended task. This ensures that all information remains confidential, secure, and protected.

## HOW TO USE THIS RESOURCE

This resource outlines the scope of work (**bolded, numbered subheadings**), followed by a broad description of what is generally included in that section. The un-bolded text is sample language based on our experiences. Organizations should tailor all agreements to their specific needs, funding requirements, and operational context. Applicable laws, regulations, contractual requirements, and organizational policies should always take precedence. It is recommended that organizations consult with legal counsel or appropriate professionals when developing or finalizing contractual agreements.

## 1. Scope Overview

**Includes the general information for both parties and the broad timeline for the work.**

Sample Language:

This Scope of Work (SOW) outlines the evaluation services to be provided by [Consultant/Firm Name] to [Client Organization Name] in support of [Program Name].

The purpose of this engagement is to support the development, implementation, and/or refinement of evaluation activities that assess program processes, outcomes, and impact.

Services will be provided during the period of [Start Date] through [End Date]

## 2. Evaluation Approach

**Includes an overview of the evaluation approach and philosophy. This could include specific evaluation frameworks and/or organizational or individual values.**

Sample Language:

The Consultant will apply an ecological lens, recognizing that programs operate within complex systems influenced by individual, organizational, community, and broader socio-political factors. This approach ensures that findings are interpreted within the full context in which services are delivered.

A mixed-methods (multi-method) design will be used whenever appropriate, integrating quantitative and qualitative data to provide a comprehensive understanding of program implementation and outcomes. Quantitative data will support measurement of outputs and outcomes, while qualitative data will elevate participant experiences, contextual factors, and unintended impacts.

Central to this approach is a commitment to co-creation and partner engagement. The Consultant will work in partnership with the Client, program staff, and relevant stakeholders to:

- ▶ Define evaluation questions and priorities
- ▶ Inform data collection strategies
- ▶ Interpret findings and identify actionable insights

This collaborative process helps ensure that the evaluation is culturally responsive, grounded in real-world practice, and produces findings that are meaningful, credible, and actionable for continuous improvement and decision-making.

### 3. Evaluation Activities

**Includes specifics of the work to be done. These sub-sections are examples of varying evaluation work and can be used individually or in any combination to meet the organization's or an individual's needs. This is not an exhaustive list.**

Sample Language:

#### **Evaluation Planning and Design**

The Consultant will work collaboratively with the Client to design an evaluation approach that aligns with program goals, funder requirements, and community context. Activities may include:

- ▶ Development or refinement of a logic model
- ▶ Identification of evaluation questions (process and outcome)
- ▶ Selection of appropriate evaluation frameworks (e.g., participatory, utilization-focused, ecological)
- ▶ Development of a written evaluation plan

#### **Data Collection and Tools**

The Consultant will support the development and/or implementation of data collection systems and tools, which may include:

- ▶ Surveys (pre/post, satisfaction, or follow-up)
- ▶ Interview and focus group protocols
- ▶ Data tracking systems (e.g., dashboards, databases)
- ▶ Data collection guidance for program staff

The Consultant may also provide training and technical assistance to ensure accurate and consistent data collection.

#### **Data Collection and Management**

The Consultant will support or oversee data collection activities, which may include:

- ▶ Monitoring data quality and completeness
- ▶ Supporting recruitment and participation (if applicable)

- ▶ Conducting interviews, focus groups, or observations
- ▶ Ensuring compliance with data privacy and ethical standards

### **Data Analysis**

The Consultant will analyze quantitative and/or qualitative data to assess program performance and outcomes. Activities may include:

- ▶ Descriptive and inferential statistical analysis
- ▶ Thematic coding of qualitative data
- ▶ Integration of multiple data sources
- ▶ Identification of trends, strengths, and areas for improvement

### **Reporting and Deliverables**

The Consultant will produce the following deliverables (customize as needed):

- ▶ Quarterly Reports: Summarizing program activities, outputs, and progress toward goals
- ▶ Annual Report: Comprehensive analysis of outcomes and program impact
- ▶ Special Reports (as applicable): Needs assessments, dashboards, data summaries

Reports will include both quantitative and qualitative findings and may be shared with funders and stakeholders.

## **4. Deliverables and Timeline**

**Includes explicit deliverables culminating from the evaluation work and the specific date the deliverable will be submitted to the client. If there are any funder-specific evaluation requirements, note them here.**

Sample Language/Table:

Deliverable Name	Description	Deliverable Type	Roles & Responsibilities	Date of Submission
<b>Final Logic Model</b>	Client-branded program logic model, including an initial draft refined with 2 rounds of feedback from the client.	Word document draft, PDF branded final	<p><u>Client:</u> Invites partners and engages in a 2-hour-long facilitated meeting; provides feedback on the draft</p> <p><u>Consultant:</u> Hosts facilitation and drafts product</p>	<b>January 15, 2027</b>
<b>Quarterly Report</b>	Narrative + data report highlighting the program’s accomplishments, challenges, data, and outcomes from the cumulative implementation through Year 2, Quarter 3.	Word document draft, PDF branded final	<p><u>Client:</u> Provides updates on project during check-ins; enters data into tracking system</p> <p><u>Consultant:</u> Analyzes data, drafts report in line with funder requirements</p>	<b>July 30, 2027</b>
<b>Needs Assessment</b>	Mixed methods formal, long-form report including needs assessment approach, methods, quantitative data and qualitative data highlighting the core behavioral health needs of the target community.	<p>Word document draft, PDF branded final</p> <p>Slide deck (PowerPoint)</p>	<p><u>Client:</u> Distributes surveys to the network for data collection; provides updates at check-ins</p> <p><u>Consultant:</u> Builds survey and hosts data; analyzes data, drafts report in line with funder requirements</p>	<b>October 30, 2027</b>

## 5. Roles and Responsibilities

Includes general things each party is responsible for, so there is clarity on who “owns” individual processes to accomplish the work as outlined in Section 4.

Sample Language:

### **Consultant Responsibilities**

- ▶ Deliver services as outlined in this SOW
- ▶ Communicate regularly with the Client
- ▶ Maintain confidentiality of all data

### **Client Responsibilities**

- ▶ Provide timely access to data and program information
- ▶ Review and provide feedback within agreed-upon time frames
- ▶ Support recruitment or data collection as needed
- ▶ Designate a primary point of contact

## 6. Budget and Payment Terms

Includes the cost of services being provided, which are typically broken down by deliverable or by hour/time. Scopes generally include one or the other - not both. Specifics can also be incorporated into Section 5 within the table as an additional column. As a note, fixed-fee contracts are tied to deliverable completion/outcomes, whereas hourly contracts are based on time and not necessarily on deliverable completion or outcomes.

Sample Language:

### **Option A: Fixed Fee (Deliverables-Based)**

The total cost for services under this agreement shall not exceed \$[Amount], contingent upon completion of deliverables.

Payments will be made within 60 days of receipt of the deliverable and invoice according to the following schedule:

[Deliverable] → \$[Amount]

[Deliverable] → \$[Amount]

### **Option B: Hourly Rate**

The total cost for services under this agreement shall not exceed \$[Amount], contingent upon completion of deliverables.

Services will be billed at a rate of \$[Rate]/hour, with an estimated total of [#] hours. Payments will be made within 60 days of receipt of the detailed invoice.

**Note:** If there are changes to a “not to exceed” amount based on time, money, or deliverables, an addendum or amendment should be added to the scope to protect both parties.

## **7. Data Ownership and Use**

**Includes deliverable and, data ownership, and use cases.**

### Sample Language:

All materials, data, and deliverables produced under this agreement shall be the property of the Client upon completion of the project. The Consultant may retain copies for internal use and, with permission, may share de-identified work samples for professional purposes.

### Optional AI-integration language:

The Consultant may use generative artificial intelligence, large language models, or machine learning tools to draft, refine, and prepare reports, deliverables, presentations, and other related materials requested by the Client. The Consultant will ensure that all data processed by these tools is handled securely, maintaining confidentiality and complying with data protection requirements. Consultant AI policy available upon request.

## **8. Scope Modifications**

### Sample Language:

No other contract, oral or otherwise, regarding the Scope of Work in connection with the Contract shall be deemed to exist or bind the Parties. If any provision of this Agreement and/or any applicable provision of the Contract is held invalid or void, the remainder of this Agreement and any applicable provision of the Contract shall not be affected thereby if such remainder would then continue to conform to the terms and requirements of applicable law. Changes to the Scope of

Work must be in writing and mutually agreed upon by both parties as stipulated in a separate addendum.

## 9. Confidentiality

Sample Language:

The Consultant agrees to maintain the confidentiality of all data and information obtained through this engagement and to comply with all applicable data protection requirements.

## 10. Signatures

Sample Language:

\_\_\_\_\_ Date: \_\_\_\_\_

**Name**

**Title of Authorized Representative from the individual executing the scope of work**

\_\_\_\_\_ Date: \_\_\_\_\_

**Name**

**Title of Authorized Representative from the contracting organization (the payer)**

**This agreement is not valid until signed by both parties.**