



PRACTICAL PROCUREMENT RESOURCE

Service Scoping Checklist

Research, evaluation, data and advisory assignments in Ethiopia

A concise tool for clients preparing a TOR, RFQ or internal brief before approaching Gesem or another implementation partner. Use it to clarify the decision need, service type, methods, geography, responsibilities, quality requirements and expected outputs before costing begins.

Use this checklist when: commissioning a study, evaluation, fieldwork package, data-analysis assignment, strategic-planning process, organisational-development engagement or capacity-building activity.

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1. Start with the decision, not the method

The first scoping question is not “Which tool should we use?” It is “What decision must this assignment support?” The answer usually indicates the most appropriate service family.

Client decision or problem	Best-fit service	Typical evidence / outputs
Establish starting values or measure change	Baseline / endline evaluation; MEL	Indicator framework, survey, comparison analysis, qualitative explanation, evaluation report
Understand needs, feasibility, context or markets	Research & assessments	Needs assessment, feasibility study, household/institutional survey, policy or market analysis
Explain experiences, mechanisms or stakeholder perspectives	Qualitative research	KIIs, FGDs, IDIs, case studies, thematic analysis and explanatory findings
Implement a defined survey or fieldwork package	Country implementation / digital data collection	Localisation, programming, recruitment, training, supervision, QA and clean handover
Clean, reconstruct, analyse or visualise existing data	Data management & analytics	Cleaning rules, codebook, derived indicators, statistical analysis, dashboards and reproducible outputs
Set organisational or programme direction	Strategic planning & programme design	Situation analysis, theory of change, strategic choices, implementation matrix and monitoring framework
Strengthen governance, systems or operating procedures	Organisational development	Capacity assessment, policies/manuals, structure options, accountability and improvement plan
Close a capability or practice gap	Training & capacity building	Needs assessment, curriculum, practical learning, facilitation and follow-up plan

Quick distinction

Research / assessment	Best when the main question is what is happening, what is needed, what is feasible, or what conditions matter.
Evaluation	Best when the main question is whether a programme is relevant, effective, efficient, coherent, sustainable or producing intended results.
Strategic planning	Best when evidence already exists or can be generated and the task is to choose priorities, direction, implementation pathways and monitoring arrangements.
Organisational development	Best when the core issue is internal governance, roles, systems, policies, procedures, performance or institutional resilience.

2. Define the engagement model

Many TORs become expensive or difficult to compare because it is unclear which responsibilities belong to the client and which belong to the consultant. Select the model before requesting a quotation.

Engagement model	Client normally provides	Consultant / country partner normally provides
Full assignment	TOR, background documents, access to stakeholders, review decisions	Design, tools, sampling, fieldwork, analysis, reporting, validation and final deliverables
Country implementation	Global protocol, core tools, technical standards, central coordination	Ethiopia adaptation, approvals support, recruitment, training, field delivery, QA and handover
Fieldwork only	Final questionnaire/guides, sample frame/rules, platform or programming specifications	Mobilisation, training, logistics, supervision, interviews, daily checks and field completion records
Data / analysis only	Dataset, variable definitions, indicator logic, research questions	Data audit, cleaning, coding, analysis, tables/figures, documentation and interpretation
Strategic / institutional advisory	Mandate, prior plans, policies, organisational documents, access to decision-makers	Diagnosis, consultation, options, facilitation, strategy/systems documents and implementation tools

3. Minimum information for a credible quotation

- [] Purpose: What decision or use should the assignment support?
- [] Geography: Regions, zones/woredas, sites and any hard-to-reach locations.
- [] Population and scale: Target groups, approximate sample or expected interview volume.
- [] Methods: Survey, KII, FGD, IDI, observation, document review, workshop or other components.
- [] Languages: Interview languages and whether translation/back-translation is required.
- [] Digital platform: KoboToolbox, client-provided SurveyCTO, other system, or consultant recommendation.
- [] Timeline: Mobilisation date, field dates, reporting deadline and fixed milestones.
- [] Client inputs: Sampling frame, questionnaire, protocol, data, introductions, approvals or existing tools.
- [] Quality requirements: Pilot, spot checks, back-checks, audio/GPS rules, daily dashboards or validation checks.
- [] Deliverables: Inception report, tools, datasets, codebook, analysis syntax, report, brief, presentation or manuals.
- [] Data security: Storage, access, transfer, retention and any sensitive-data restrictions.
- [] Commercial format: Lump sum, itemised BoQ, daily rates, taxes/VAT, payment milestones and quotation validity.

4. Assignment scoping worksheet

Complete this one-page brief before sending an RFQ. It reduces clarification cycles and makes quotations more comparable.

Assignment title / working title	
Primary decision or purpose	
Target population / institutions	
Geographic coverage	
Estimated sample / interview volume	
Methods required	
Languages	
Digital platform / tool ownership	
Expected field period	
Final deadline	
Required deliverables	
Quality-control requirements	
Client-provided inputs	
Budget / quotation format	

Before release: confirm whether the TOR describes a full technical assignment, a fieldwork package, or a specialist component. This single distinction often changes team composition, timeline, risk allocation and price.

Useful next step

For a service-selection overview, visit grcplc.com/services.php. For Ethiopia fieldwork planning, see the free [Research and Fieldwork in Ethiopia guide](#).

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