ANNEX 8:
CONSULTANT SELECTION CONSIDERATIONS

For implementing partners (IPs) utilizing an external consultant, this annex covers (1) developing the Terms of Reference (TOR) for a consultant, (2) selecting a qualified candidate, and (3) onboarding the consultant.

DEVELOP A CONSULTANT TERMS OF REFERENCE

See Annex 9: Consultant TOR Template for a sample format to communicate the desired profile of a consultant and what they will deliver. The TOR should explain the objective of your project's gender analysis, outline the tasks and deliverables to be completed, and list the desired candidate qualifications and experience. The TOR should specify the expected level of effort and timeline to complete the gender analysis.

SELECT GENDER ANALYSIS CONSULTANT(S)

Following your organization's recruitment and procurement processes, use the TOR to recruit one or more consultants to conduct the gender analysis. Consultants need strong technical and interpersonal skills, and they should embody the values of gender equality. Below are sample questions for interviewing, reviewing work products, and checking references.

TABLE 8-1: SAMPLE QUESTIONS FOR SELECTING GENDER ANALYSIS CONSULTANT(S)	
STEP	SAMPLE QUESTIONS TO CONSIDER AND ASK
INTERVIEWING	- Please describe your experience in developing a gender analysis for a project and summarize some of the key findings. - Please describe your experience supporting projects to develop strategies and actions to respond to the gender analysis findings. What was your approach? Were there any challenges? If yes, what were they and how did you overcome them? - What experience do you have working on gender integration within the [xxx] sector? (Fill in the sector related to your project.) What were some of the most pressing gender issues related to the sector? - What research methodologies do you have expertise with – either qualitative or quantitative? What are some examples of when you used these methodologies? - What is your experience with conducting desk reviews of secondary data? What approach have you used? - What experience do you have in training others in data collection? What should be included in such training? - What are your initial thoughts on how to approach primary data collection for our gender analysis? (Would you recommend interviews, focus groups, surveys, etc?) - What methods do you use to make sure your research and findings are relevant to the project? How do you coordinate with project staff for input and feedback?

REVIEWING SAMPLES OF WORK	• Are the report findings clear and concise? Are the recommendations specific and actionable? • Does the report have an intersectional lens, avoiding generalizations? Does it analyze other identities (e.g., age, marital status, class, citizenship, etc.) in addition to gender identity? • Does the report analyze the experiences of individuals of all genders, including women and girls, men and boys, and individuals with diverse sexual orientation, gender identity, gender expression, and sex characteristics (SOGIESC)? • Is data disaggregated by sex? Is there other disaggregated data available (e.g., by age, region, ethnicity, etc.)? • Does the analysis use the ADS 205 gender analysis domains and the additional inclusive development analysis domain (Personal Safety and Security)? • Does the report analyze gender-specific risks, and the factors that could exacerbate these risks?
CONTACTING REFERENCES	• What was their experience working with the consultant? • Were the consultant's findings and recommendations relevant to the project? • Did the consultant complete all deliverables on time? • How did the consultant respond to feedback?

ONBOARD THE CONSULTANT(S)

After signing a contract that outlines expectations, deliverables, and timelines, the gender analysis steering committee should meet with the consultant(s) to initiate the work. The introductory meeting is an opportunity to confirm details of the gender analysis Scope of Work (SOW), the consultant's responsibilities, and coordination methods. Sharing relevant documents with the consultant(s) prior to the meeting is helpful — even if in draft form — so they can review and prepare questions. Table 8-2 provides examples of materials to share and topics to cover.

TABLE 8-2: RECOMMENDED CONTENT FOR CONSULTANT ONBOARDING	
TO SHARE BEFORE THE INTRODUCTORY MEETING	**TO COVER DURING THE INTRODUCTORY MEETING**
• Project description, including the period of performance, problem analysis, theory of change, and description of program components • Monitoring, Evaluation, and Learning plan, including the results framework and indicators • Work plan • Any baseline assessments and data • Pre-award gender analysis conducted by USAID (if available) • Reports from a preceding project, if this is a follow-on • External literature, including reports and publications relevant to the project	• Introduce the consultant to the gender analysis steering committee and explain each person's role • Review background of the project so that the consultant understands if/how gender considerations informed the project design; suggest potential lines of inquiry that would provide valuable information for informing the project's activities and MEL • Confirm the gender analysis process and timeline, including how the steering committee will provide feedback at each step • Clarify expectations for developing a gender action plan, if included in the consultant's SOW