Methodological Briefs on Evidence Synthesis
Brief 5: Commissioning and managing an evidence synthesis project

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This series of eight briefs, produced by the UNICEF Office of Research – Innocenti, is intended to provide guidance on how to undertake, commission and manage evidence synthesis products such as systematic reviews, rapid evidence assessments and evidence gap maps. Evidence synthesis can play an important role in UNICEF’s knowledge management and evidence translation efforts by collating knowledge from multiple studies on what interventions work, and why and how they work. It makes research more accessible and therefore can contribute to evidence-informed programming and policy decisions. The primary audience for these briefs is professionals, including UNICEF staff, who conduct, commission or interpret research and evaluation findings in development contexts to make decisions about policy, programming and advocacy. These briefs cover topics including:

- What is evidence synthesis? What kinds of questions can evidence synthesis products help to answer and how can they contribute to decision-making?
- How to design and undertake a systematic review, a rapid evidence assessment or an evidence gap map
- How to commission and manage an evidence synthesis product
- The future of evidence synthesis and key innovations for making the process faster and more efficient

These briefs have been written by Shivit Bakrania with input from some of the world’s leading evidence synthesis experts. The other briefs in this series can be accessed at <www.unicef-irc.org>.

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To consult and download the Methodological Briefs on Evidence Synthesis and a glossary of key terms, visit the website <www.unicef-irc.org>.


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FURTHER GUIDANCE ON EVIDENCE SYNTHESIS

This series of methodological briefs is part of broader efforts by UNICEF Innocenti to support UNICEF staff to appraise, commission, generate, communicate and use research to drive change for children.

For further guidance on evidence synthesis, or to ask about anything covered in these methodological briefs, please contact the author, Shivit Bakrania, or Kerry Albright, Chief of Research Facilitation and Knowledge Management, at <research@unicef.org>.

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1. INTRODUCTION

This brief focuses on the key activities for commissioning and managing an evidence synthesis project. Research commissioners will likely be involved in several activities, including: deciding on the policy problem that could benefit from the findings of evidence synthesis; formulating a research question and/or objectives that respond to the policy problem; developing terms of reference (ToR); assessing proposals and research team expertise and skills; supporting an externally contracted research team as part of an expert or advisory group; collaborating with the research team on a research protocol; providing feedback and comments on the final report or product; and supporting evidence brokering to enhance uptake and use of the final product. This brief will consider several of these activities in turn.

Box 1. Key questions addressed in this brief

- What needs to be included in the ToR for an evidence synthesis product?
- What skills and expertise does a research team require?
- What is an advisory group, who should be included, and how can the group be involved in the process?
- At what stages should UNICEF research commissioners give feedback?
- What are the key cost and time considerations?

2. TERMS OF REFERENCE

The principles of a good ToR for a research project also apply to the ToR for an evidence synthesis project. The ToR should be developed after the appropriate evidence synthesis product has been identified to respond to a clear policy problem and once some preliminary scoping has been undertaken to formulate an initial research question and/or objectives as well as an initial indication of the scope. See Brief 3, section 3 for more information on developing an initial research question and scope. The subsections below can be used as a template for developing a ToR for evidence synthesis. Box 2 also provides a link to sample ToR for an evidence gap map (EGM).

Box 2. Example ToR

The ToR for the Evidence Gap Map on Adolescent Well-being in Low- and Middle-income Countries can be accessed here. The structure and content of the ToR are reflected in the subsections/subheadings in this section of the brief.

2.1 Background and rationale

Briefly explain the evidence synthesis product and how it can be useful to UNICEF. How does it relate to UNICEF’s current strategic documents and goals? Does it relate to existing work or an existing priority topic or theme? Situate the product in context and describe the policy problem or evidence gap to which it responds. Note that the rationale will be different for a systematic review (SR), a rapid evidence assessment (REA) and an EGM. SRs and REAs attempt to synthesize evidence (the findings of the research) on a given topic or theme – for example, this may be in response to the fact that UNICEF needs to know more about the effects of a certain intervention. The purpose of an EGM is to map the evidence (to describe the focus and context of the research). This may be in response to an identified need to know more about the nature and distribution of evidence on a certain topic or theme in order to inform future research commissioning.

It is useful here to include a brief description of the task, briefly stating that UNICEF is seeking to commission a team to produce an SR, REA or EGM; to define the product being commissioned; and to briefly describe the activities involved in producing the product. See Brief 2, section 2 for definitions of the different products and information on their different purposes.

2.2 Research question and/or objectives

Having undertaken some initial thinking and research, state the overall research question and/or objectives for the SR or REA, or the thematic area and scope. Explain that these can be refined further later, in collaboration with the research team, however, it is useful to be as clear and focused as possible at this stage. See Brief 3, section 3, provides for more information on how to define the initial research question and scope.

If there is an existing conceptual framework that research teams should draw upon when considering their approach, it is useful to refer to it here. This can also be placed in an annex to the ToR. The conceptual framework can be amended during the course of the work.
2.3 The intended audience and the publication and use of findings

State clearly how the product will be used, not only in publications and outputs, but also how it will feed into the decision-making processes of UNICEF and strategic partners. Consideration should also be given to where the research protocol, the product, the final report and any summaries or briefs stemming from the report will be published. These will likely be published on a UNICEF thematic or country office website. However, external publication is also strongly recommended. According to UNICEF’s guidance on external academic publishing, research products should be made available through an open access format wherever possible. An increasing number of peer-reviewed journals publish evidence synthesis. Some of these are open access and others charge a publication fee for open access (see Box 3).

Box 3. Examples of peer-reviewed journals that publish evidence synthesis

Systematic Reviews: Publishes high-quality systematic review products, including systematic review protocols, systematic reviews related to a very broad definition of health, rapid reviews, updates of already completed systematic reviews, and methods research related to the science of systematic reviews.

Campbell Systematic Reviews: An open access journal under the editorial control of the Campbell Collaboration. The journal publishes systematic reviews, EGMs, and methods research papers. Topic areas include methods, social welfare, disability, education, international development, crime and justice, training, knowledge translation and implementation, and business and management.

PLOS ONE: Open access and accepts research in over 200 subject areas across science, engineering, medicine, social sciences and humanities.

2.4 Suggested approach and methods

This section should clarify that the approach and methods used should be consistent with internationally recognized standards for evidence synthesis, including for the development of the scope and protocol (see Brief 3, sections 3 and 4) and the systematic collation and analysis of evidence (see Brief 4). The ToR can describe this in three main stages:

1. Scoping and the development of protocol (see Brief 3, sections 3 and 4).

2. Collation and analysis using clear, transparent and explicit systematic methods (see Brief 4, sections 2 to 7).

3. Production of a final report including a presentation of the findings from analysis and/or synthesis. For an EGM, the final stage will include the production of an interactive online EGM.

For an EGM, the ToR should state that an interactive online EGM should be created, and examples such as the UNICEF EGM on Adolescent Well-being in Low- and Middle-income Countries or the Campbell-UNICEF Child Welfare Mega Map can be referred to.

Note that the emphasis on certain steps, such as the scoping and the approach to analysis or synthesis, may differ depending on the time and resources available. For example, the methodology for a REA will not be as comprehensive as that for an SR.

Certain steps in the development of the product do not need to be fully defined at this stage, for example, the method of analysis or synthesis. The details can be discussed and finalized with the externally contracted research team, or an assessment can be made on how research teams plan to approach the research question at the proposal stage. When commissioning an SR, it may be useful to keep in mind whether the research question is a ‘what works’ type question or a ‘how’ or ‘why’ type question, as this will influence the eventual approach to analysis and synthesis. Brief 4, section 7, provides further details on different approaches to analysis.

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2.5 Schedule of work/deliverables/payment

This will define the outputs to be delivered, including a timeline of outputs to be delivered to whom and when. For an evidence synthesis product, the key deliverables are likely to be:

- An initial scoping report – within two weeks to one month
- A draft protocol – within two weeks to two months
- A draft report/EGM – 1+ years for an SR; 2–6 months for an REA; 6–9 months for an EGM.

Additional deliverables may include communication materials, such as plain English summaries, policy briefs or evidence brokering or promotional time, often involving a representative of the research team and a UNICEF colleague in tandem.

Remember to build into the schedule time between the deliverables for feedback, revisions and potential meetings or workshops.

The duration of the consultancy should also be stated here. Remember to consider the variation in time needed for different evidence synthesis products. See Brief 2, section 2, provides more details on the time frames and approximate costs for SRs, REAs and EGMs.

2.6 Role and responsibilities of the consultant

This section should state that the consultant is responsible for:

- Meeting all the deliverables stated in section 2.5 on time
- Ensuring that work meets the highest academic standards for referencing and citation and that consultants do not engage in plagiarism or breaches of copyright law
- Ensuring that any written outputs to be published follow the UNICEF Style Book
- Meeting all the deliverable deadlines unless otherwise agreed in advance
- Responding within one week to questions from UNICEF about deliverables.

2.7 Research team eligibility criteria

This section should list the experience and skills required by the research team to undertake the task. Note that the ToR will refer to the ‘consultant’ but that the consultancy should be made open to institutions as well. See section 3 for more information on the skills and expertise required by a research team working on evidence synthesis products.

2.8 Ethics

Evidence synthesis products are likely to entail minimal ethical considerations given that they are secondary research products that compile studies already available in the public domain. However, all ToR should note that the successful research team will be required to ensure that the project meets UNICEF’s ethical standards in research. Some research teams will also be obliged to comply with the ethical procedures of their own organizations.

2.9 Supervision and work arrangements

This section should state clearly who is responsible for managing the process, and the primary UNICEF point of contact. It should also state that selected UNICEF and external staff will be consulted throughout the process as part of an expert or advisory group to review the deliverables (for more information on advisory group functions, see section 4).

Regarding work arrangements, research teams working on an evidence synthesis product will normally work from a location of their choice. It will be a desk-based secondary research product, so no fieldwork is required. If a workshop is envisaged (for example, to discuss the scoping and protocol or to present the findings), it will be necessary to consider meeting face to face or by Skype or conference call. For a face-to-face meeting or presentation, it is necessary to indicate that travel is required to the commissioning UNICEF office or to the workshop location.

2.10 Payment schedule

This section should outline the payment schedule, including the payment instalments and percentage of funds to be transferred in each instalment. See section 6.4 for more details on how best to schedule payments.
3. TEAM EXPERTISE AND SKILLS

The composition of a research team for an evidence synthesis project will depend on the type of evidence synthesis product being commissioned and its scope. However, the skills and experience required will encompass subject matter and methodological expertise. It is also essential to ensure that the research team has access to academic and bibliographic databases, which in many cases will require a paid subscription. Table 1 summarizes the core competencies for an evidence synthesis research team.

3.1 Team leader/principal investigator

Normally, the team will have a team leader or a principal investigator who has overall responsibility for managing the process and delivering the final product.

His/her key tasks will be to: supervise the research team; undertake, or ensure quality in, the scoping and protocol development phase; develop, and ensure quality in, the methodology; ensure quality in the screening, data extraction and critical appraisal of studies; undertake, or ensure quality in, the analysis or synthesis of findings; have overall and final responsibility for the final product; and liaise with the UNICEF primary contact and the expert or advisory group.

It is necessary for the team leader to have methodological expertise in evidence synthesis. This is necessary because the team leader will be responsible for ensuring that the methodology used meets internationally recognized standards and that quality standards are adhered to. It is also desirable for the team leader to have subject matter expertise, which will feed into the overall thematic direction of the project. However, it can be rare to find an individual with this combination of expertise (methodological and subject matter). An alternative arrangement is to have two ‘co-leads’: one with subject-matter expertise and the other with experience in conducting evidence synthesis. Yet another arrangement is where the UNICEF commissioning manager has subject matter expertise and works collaboratively with the team leader and research team to ensure that key concepts and literature are integrated into the scope and approach. This will require the commissioning manager to dedicate sufficient time to the task.

3.2 Research assistants

Normally, a team working on evidence synthesis will have two or more research assistants working under the supervision of the team leader.

Team compositions will vary, as will the division of responsibilities between the team leader and research team. There may be a mix of more- and less-experienced researchers working under the supervision of a team leader on different tasks. However, at a minimum, the team should include an experienced team leader supervising a group of two or more research assistants with adequate quality control and supervision arrangements in place.

Ultimately, a larger team means that tasks can be allocated amongst more people and that some tasks can be undertaken in parallel, which speeds up the process. Therefore, the use of less experienced junior researchers to undertake some tasks will help to reduce costs.

Less experienced research assistants can work on the labour-intensive tasks, such as the systematic searches, screening and data extraction. Ideally, these research assistants would have some prior experience of these tasks, but even those without prior experience can undertake the tasks with adequate supervision and training from the team leader. These researchers should have experience in conducting research, with some knowledge of research designs and methods.

More experienced researchers will be able to contribute to other tasks that require more expertise, such as: undertaking initial research to inform conceptual elements of the scoping and protocol development phases; quality appraisal; analysis or synthesis of findings; and writing the final report. These will usually be individuals with experience of working on evidence synthesis products. They may also have some subject matter expertise, but this is not necessary if the team leader/co-lead/UNICEF commissioning manager has subject matter expertise.

It may be useful for some of the researchers to have some level of competence in United Nations languages other than English, especially if the intention is to collate and include non-English studies.

2 At the time of publication, UNICEF’s academic journal subscriptions are unlikely to be adequate to enable in-house production of evidence synthesis products. Externally commissioned research teams will need to confirm that they have suitable access to academic journal databases, either through the information specialist or otherwise.
3.3 Information specialists

Information specialists are often employed in university libraries or act as independent consultants and are experts in searching academic databases. They are often deployed by research teams working on evidence synthesis products to develop a comprehensive and efficient search strategy, especially by developing the search strings. While it is generally recommended to use an information specialist, this becomes even more important if the research team has neither sufficient access nor subscriptions to academic journal databases. Information specialists will often have full, university-level access and can be deployed to gather the full texts of citations from the systematic searches.

3.4 IT/web specialists

It can be especially important to have individuals with technological or information technology (IT) expertise on the team for EGM projects. This is because the data extracted from studies need to be transformed into an interactive online EGM. This will require someone with the ability to either create the online EGM or work alongside external web developers to create it.

If the intention is to host the EGM on a UNICEF website, discussions should be held with the IT manager at an early stage. Not all UNICEF websites may be able to support the software or provide the infrastructure needed to host an EGM.

Table 1. Core competencies for an evidence synthesis research team

<table>
<thead>
<tr>
<th>Required</th>
<th>Desirable (especially for time-limited projects)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Team leader/s</strong></td>
<td></td>
</tr>
<tr>
<td>■ Experience of producing an evidence synthesis product and familiarity with the systematic approach</td>
<td>■ Familiarity with the key child rights literature</td>
</tr>
<tr>
<td>■ Ability to adequately supervise and ensure quality control over the research team</td>
<td>■ Subject matter expertise (becomes vital if it does not exist within the research team or the UNICEF commissioning manager)</td>
</tr>
<tr>
<td><strong>Junior research assistants (for undertaking the searching, screening and data extraction)</strong></td>
<td>■ Knowledge of UN languages other than English (if the intention is to include non-English studies)</td>
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<tr>
<td>■ Experience in conducting research, with knowledge of social research designs and methods</td>
<td></td>
</tr>
<tr>
<td>■ Master’s-level education</td>
<td><strong>Experienced research assistants</strong></td>
</tr>
<tr>
<td>■ Experience of working on an evidence synthesis project, with experience in conducting systematic searches, screening, data extraction, critical appraisal and analysis/synthesis</td>
<td>■ Experience in using software applications for reference management (such as Zotero) and systematic reviews (such as EPPI-Reviewer)</td>
</tr>
<tr>
<td>■ Master’s-level education</td>
<td>■ Subject matter expertise (if this is not held by the team leader or the UNICEF commissioning manager)</td>
</tr>
<tr>
<td><strong>Information specialist</strong></td>
<td>■ Knowledge of UN languages other than English (if the intention is to include non-English studies)</td>
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<tr>
<td>■ Experience in developing search strategies or demonstrable expertise in database searching</td>
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</tr>
<tr>
<td>■ Access and subscriptions to academic journal databases</td>
<td><strong>Web/IT specialist (for EGMs)</strong></td>
</tr>
<tr>
<td>■ Experience in developing online or embedded interactive content and ability to develop the EGM alone or work alongside a web developer</td>
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4. ADVISORY GROUP FUNCTIONS AND ROLES

It is useful to establish and consult with an advisory or expert group throughout the process. The advisory group can be used as a decision-making or consultative body for the evidence synthesis process and may be consulted at various stages. An advisory group is normally composed of:

- Thematic or subject matter experts: They can be from an academic and practitioner background. This may be a combination of external experts and internal UNICEF colleagues who, between them, will have knowledge of the literature and evidence base, the key policy issues and intervention types, and experience of implementing and managing programmes or of policy decision-making.

- Methodological experts: Again, these experts can be internal or external to UNICEF and will have experience in developing, managing, commissioning or using evidence synthesis products.

- Experts with local and contextual knowledge: If the product has a defined contextual or geographic focus, it is useful to have experts with local knowledge to ‘ground-truth’ the key concepts used for the conceptual framework. It can also be useful for the communication and translation of findings to encourage uptake in specific contexts.

Throughout the process, the advisory group can be consulted for their knowledge on:

- existing studies
- the theme or subject, including key concepts and definitions
- key databases, sources and organizations to be consulted for the collation of studies
- context-specific issues
- how findings can best be translated or presented for uptake in specific contexts.

The key stages at which the advisory group is likely to be consulted are:

- The scoping and protocol development phase: To provide input into the conceptual development of the product, which entails giving feedback on the initial scoping findings, and commenting on the research question/objectives, the overall scope, the key definitions stated in the protocol, the conceptual framework, and the methodology and approach to synthesis or analysis, including the sources selected for searching. Where time and resources allow, the advisory group may be invited to participate in a scoping workshop to discuss all these issues with the research team.

- The collation and analysis phase: To provide feedback and comment on the analysis undertaken and the preliminary findings.

- The draft report stage: To provide feedback and comment on the draft report and findings.

- The communication stage: To help ensure that the findings are presented in a manner that ensures uptake by the specific audience identified for this product.

5. PROTOCOL

A research protocol is a vital part of the process and should be developed after the initial scoping and before the collation stage. It is also a key document on which the UNICEF primary contact and the advisory group should provide comments and feedback. Further details of what should be included in a research protocol can be found in Brief 3, section 4. Box 4 lists some examples of repositories where research protocols can be published.

Box 4. Examples of repositories for publishing research protocols

Ideally, protocols should be shared on a repository to allow other researchers to see what research is currently being done and to avoid duplication of efforts. Examples include:

- **PROSPERO**: This is a free repository and does not involve publication costs or peer-review processes.

- **Research Registry**: This is a free repository and does not involve publication costs or peer-review processes.

- **Campbell Collaboration**: Requires registration of the entire project and the acceptance of a peer-review process for all project outputs led by Campbell.
6. COST AND TIME CONSIDERATIONS

The costs and timelines are key considerations when commissioning and managing an evidence synthesis product because of unpredictability at the beginning of the process regarding the scope and quantity of literature to be included. The indicative costs for an SR, REA and EGM will differ (for further details on the cost ranges, see Brief 2, section 2):

- An SR will take an average of 12 to 15 months and will cost from US$80,000 to US$100,000.
- A REA will take two to six months and will cost from US$20,000 to US$40,000.
- An EGM will take six to nine months and will cost from US$60,000 to US$80,000.

Note that these indicative costs are based on average costs of products commissioned through bilateral/multilateral development agencies. Costs may vary depending on commissioning agent and context.

6.1 Key cost considerations

The key cost considerations when developing a budget for an evidence synthesis product are:

- personnel time (team leader, research assistants and an information specialist)
- IT and interactive online EGM development costs (solely a consideration for EGMs)
- evidence synthesis software tool and application subscription/licence costs ((for further details on costs, see section 6.5 below and Brief 4, section 8)
- meeting or travel costs (e.g., for consultation/inception workshops or presentation meetings)
- publication costs (e.g., copy-editing, formatting, open access publication in an academic journal).

Box 5 provides an example budget for an EGM.

**Box 5. An example budget for an evidence gap map**

The example below, taken from the UNICEF EGM on Adolescent Well-being in Low- and Middle-income Countries, can be used as a guideline to develop a budget for an evidence synthesis product.

The budget was based on 200 days of work overall, within a one-year time frame, which included:

- 20 days for work on the scoping, including consultations with experts and the development of a conceptual framework for the EGM
- 35 days for developing and writing the research protocol
- 110 days for developing the EGM, including the searching, screening, data extraction and critical appraisal
- 35 days for developing the summary report and actual interactive online EGM
- a budget line for travel and subsistence for the team leader was also included for a planned consultation visit to UNICEF.

6.2 Manageability and flexibility

When drafting the ToR and costs and timelines, it is important to manage expectations in line with the specified scope and to build a certain amount of flexibility into the timeline, based on the premise that it may take longer to complete the process depending on the quantity of studies to be included. If there is a hard deadline for the product – for example, when there is a need to feed findings into a time-specific policy decision – the research team may need to be instructed to keep the process manageable within the time and cost limits imposed on it. Again, the scoping phase is key for making educated decisions on these issues, whereby certain limits or boundaries can be applied.

One helpful tool to estimate time needed for project completion is PredicTER. This free tool can be used after the systematic searches have been conducted to estimate the time needed to complete each step of the project (see Brief 4, section 8).
6.3 When a hard deadline is necessary

Where there is a hard deadline, as findings need to be applied to time-limited policy decisions, the following decisions can be considered:

- To commission a REA that has a shorter time frame, rather than a fully fledged SR

- To factor additional research staff into the budget. A larger number of junior research assistants working in parallel to search, screen and extract data will help reduce the overall timelines.

- To commission a research team with a track record in producing evidence synthesis products. Experienced teams will have the necessary infrastructure and systems in place to ensure that they can hit the ground running and work efficiently and quickly with minimal supervisory input from UNICEF.

6.4 Payment schedules and break clauses

It is useful to break the payment into at least two instalments: one after the initial scoping and protocol development phase and another after successful completion and delivery of the final product.

It is also useful to build in a clause allowing a ‘no fault’ break clause following the scoping and protocol development phase, whereby progression after this phase is dependent on satisfactory scoping and protocol development. This builds flexibility into the process, whereby a decision can be made after the scoping on whether the research objectives are investigable, dependent on the availability of evidence, and whether the task is feasible and manageable within the available time frame and budget. This is common practice amongst funders who commission evidence synthesis products, ensuring that funds are not wasted on a product that may not include enough evidence for it to be useful, and that funds are sufficient for the scope identified in the ToR.

6.5 Software tools and application subscription/licence costs

A number of tools and applications are used for managing and undertaking evidence synthesis and these are covered in more detail in Brief 4, section 8. The costs of these should be factored into a budget for evidence synthesis. This includes:

- Reference management storage or licence costs: These range from US$20 (for additional storage on an open-source application such as Zotero) to US$250 (for a paid licence to EndNote).

- Dedicated evidence synthesis software: Costs can vary according to the number of people who need access to a shared review on EPPI-Reviewer. This will cost approximately US$12 per month per person working on the project in addition to approximately US$42 per month per review for setting up a shared review that several team members can access.3

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3 Prices correct at time of publication. Please consult the respective websites for up-to-date pricing information (for further details, see Brief 4, section 8).