



THIRD SECTOR
Dumfries and Galloway

Terms of Reference

What is a terms of reference and when to use one?

SNAPSHOT

GOVERNANCE

Introduction

Terms of Reference (ToR) is a document that outlines the scope, objectives, roles, responsibilities, and processes of a specific project, task, committee, or working group. It serves as a guiding document that provides clarity on what is expected, how activities will be carried out, and how outcomes will be achieved.

Terms of Reference are often used to ensure that everyone involved in a project or initiative has a common understanding of the project's goals and parameters.

When to use a Terms of Reference

Project Management: ToRs are essential for defining the scope, objectives, and roles of a project, within a team or with partners from different disciplines and/or departments. They provide a blueprint for successful project execution.

Committees and Working Groups: When establishing committees or working groups, ToRs ensure that members understand their roles, responsibilities, and the purpose of the group.

Consultancies or Partnerships: When working with external consultants or partners, ToRs clarify the expectations, deliverables, and responsibilities of all parties.

Research Initiatives: ToRs are useful for research projects, outlining the research objectives, methodology, timelines, and expected outcomes.

Task Forces: When tackling specific tasks or challenges, ToRs guide the activities of task forces or special projects.

Change Management Initiatives: During organisational change, ToRs provide guidance for change management teams or steering committees.

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Key elements typically included in a Terms of Reference

Title and Purpose: Start with a clear title that reflects the purpose of the document. It explains the project, task, or committee's overall objective and what it aims to achieve.

Scope: This should define the boundaries of the project or task. Scope outlines what is included and what is excluded from the restrictions/confines of the initiative.

Objectives: List the specific goals and outcomes that the project or task intends to achieve. These objectives should be measurable and aligned with the project's purpose.

Roles and Responsibilities: Outline the roles and responsibilities of individuals or groups involved in the project. This includes project sponsors, team members, leaders, and any other relevant parties.

Timeline and Schedule: Include information about the project's timeline, key milestones, and deadlines. This helps ensure that the project progresses according to the intended schedule.

Resources and Budget: Outline the resources needed for the project, including human resources, budget allocation, equipment, and materials.

Decision-Making Process: Describe how decisions will be made within the project, including who has the authority to make decisions and how stakeholders will be involved.

Communication Plan: Detail how communication will be managed among project stakeholders, team members, and other relevant parties.

Reporting and Monitoring: Specify how progress will be monitored, what reporting mechanisms will be used, and how feedback will be collected and acted upon.

Summary

Overall, Terms of Reference provide a structured framework for managing projects, initiatives, and collaborative efforts by establishing clear expectations and defining how things will be accomplished.

