### Tool 1a: Scoping the Case for Investment

**Purpose:** Set the stage for your Case for Investment by identifying the purpose, methods, and constraints of the analysis.

**Used in:** Tool 1c, 8a

What to do: Answer all the questions in the document to scope your Case for Investment

1. **Purpose**

Why is the Case for Investment evaluation taking place?

1. **Forecast analysis or impact evaluation**

Are you evaluating impacts your program has had or will have? Choose one.

1. **Guiding question**

What is your Case for Investment question?

1. **Thematic constraints**

Are you evaluating the entire program or specific parts?

* 1. If specific, describe which parts.
1. **Geographic constraints**

Which areas/regions does your Case for Investment cover?

1. **Evaluation period**

What time period are you evaluating in your Case for Investment (e.g., impacts over the last three years)?

1. **Timeline**

What is the timeframe for conducting your Case for Investment work? Refer to the *Eight Steps to Building a Case for Investment* to support defining your timeline.

1. **Resources**

What resources do you have for the Case for Investment? Consider human, financial, and technological resources.

1. **Analysis and Reporting**

How will you analyze and share your results (e.g., detailed report, a presentation, or an interactive webinar, all/other)?

Mention the people involved and tools needed for this step.

1. **Other Issues**

Are there ethical or cultural issues/protocols that need to be identified upfront?

Are there any big risk factors that might affect this evaluation?