



Welcome

- Introductions (Ulrike)
- Menti
<https://www.menti.com/5s87sobqxq>



Evaluation – what is it?

“Any systematic process to judge merit, worth or significance by combining evidence and values” (Better Evaluation)

“Evaluation is a systematic assessment of the design, implementation and outcomes of an intervention. It involves understanding how an intervention is being, or has been, implemented and what effects it has, for whom and why. It identifies what can be improved and estimates its overall impacts and cost-effectiveness.” (Magenta Book, UK Gov)

It includes evaluations done by **different groups**, such as:

- external evaluators
- internal staff
- communities

It includes evaluations that are intended to be used for **different purposes**:

- **formatively**, to make *improvements*
- **summatively**, to *inform decisions* about whether to start, continue, expand or stop an intervention.

My experiences of managing large evaluations

- Within Government - large range of expectations and experiences ranging from people who want to experiment with new methods to utter distrust.
- Many people are suspicious of evaluations and see them as an 'outside in' experience – it doesn't have to be.
- It can be difficult to remain truly independent when working with large teams/client base and everyone is in learning mode – and that's OK. Important to keep explaining why we're evaluating and what the benefits are for all.
- Importance of evaluation quality, data quality, strong teams, honest conversations. Noting your evaluation approach, sources, capabilities, expectations.



The Purpose of conducting an evaluation is the key question. Who is the audience?

Different types of Evaluations & their core questions (not an exhaustive list)

Evaluation Type	Core Questions
Impact	<ul style="list-style-type: none">• What difference did the intervention make?• How much of a difference?• How did it make a difference?• What difference did it make for whom, under what circumstances?
Outcome	<ul style="list-style-type: none">• Has the overall program goal been achieved?• What, if any factors outside the program have contributed or hindered the desired change?• What, if any unintended change has occurred as a result of the program?
Summative	<ul style="list-style-type: none">• Do you continue the program? If so, do you continue it in its entirety?• Is it possible to implement the program in other settings?• How sustainable is the program?• What recommendations have evolved out of the program?
Process	<ul style="list-style-type: none">• Has the project reached the target group? Are all project activities reaching all parts of the target group?• Are participants and other key stakeholders satisfied with all aspects of the project?• Are all activities being implemented as intended? If not why?• What if any changes have been made to intended activities?• Are all materials, information and presentations suitable for the target audience?

What are Qualitative data/sources/methods?

- Qualitative data collection and analysis produce data that are not easily summarised in numerical form (but they can be coded!)
- They help to explain **how and why** a particular project or programme operates as it does in a particular context.
- May include images, videos, text and, above all, people's written or spoken words.
- They help us understand attitudes or behaviours, beliefs, opinions, experiences and priorities. They are generated in response to questions like "Why do you think this happened?" and "How do you think this will affect you?"

Methods (from [Magenta book Annex A](#)):

- A1. Theory based methods for impact evaluation.....
 - A1.1. Qualitative Comparative Analysis (QCA)
 - A1.2. Realist evaluation
 - A1.3. Process Tracing
 - A1.4. Contribution Analysis
 - A1.5. Bayesian Updating
 - A1.6. Contribution Tracing
 - A1.7. Most Significant Change
 - A1.8. Outcome harvesting.....

Semi structured interviews, focus group discussions, case study analysis,

What have I learned about Qualitative approaches?

- It's the comfort zone of a lot of evaluation consultants and many haven't had to adopt formal approaches or experience evaluation QA.
- Those who are good at qualitative approaches tend to have a favoured 'go to' method and it's hard to be a pro at many qual methods.
- Hard to find someone comfortable in Quant and Qual.
- Frameworks and QA are helpful and sometimes painful. Evaluators can be harsh to each other!





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Evaluation Quality

Normally considers:

- conceptual framing
- transparency
- appropriateness
- validity
- credibility
- transferability
- reliability
- structure

Ref: Beffani, from her work for BEIS with Maren Duvendack.

Mixed methods (Quant + Qual). It's not a competition – it's about what works for each context.

- Enriching: using qualitative work to identify issues or obtain information on variables not obtained by quantitative surveys.
- Examining: generating hypotheses from qualitative work to be tested through the quantitative approach.
- Explaining: using qualitative data to understand unanticipated results from quantitative data.
- Triangulation (Confirming/reinforcing; Rejecting): verifying or rejecting results from quantitative data using qualitative data (or vice versa)

What + How questions

Useful framing thoughts



The [OECD DAC Network on Development Evaluation](#) (EvalNet) 6 evaluation criteria. These criteria can help determine the value of an intervention (policy, strategy, programme, project or activity).

Principles:

- The criteria should be applied thoughtfully to support high quality, useful evaluation.
- The use of the criteria depends on the purpose of the evaluation. The criteria should not be applied mechanistically.

Reading list

1. [Choosing Appropriate Evaluation Methods – A Tool for Assessment and Selection \(Version Two\) – CECAN. Dr Barbara Befani and excel tool](#)

	RCT (Randomised Control Trial)	Difference-in-Difference	Statistical Matching	Instrumental Variables (RDD)	Outcome Mapping	Most Significant Change	Soft Systems Modelling	Causal Loop Diagram	PSM (Participatory Systems Mapping)	BBN (Bayesian Belief Networks)	ABM (Agent Based Modelling)	Realist Evaluation	QCA (Qualitative Comparative Analysis)	Process Tracing/Bayesian Updating	Contribution Analysis
SUMMARY RESULTS - ALL STAGES															
1 Stage 1: Which Method is Best Suited to Answering My Key Evaluation Question(s)?	60/100	60/100	60/100	47/100	40/100	60/100	60/100	80/100	67/100	80/100	87/100	87/100	87/100	80/100	80/100
2 Stage 2: Which method is most able to address my other interests?	44/100	48/100	48/100	41/100	60/100	49/100	85/100	78/100	68/100	60/100	88/100	85/100	65/100	74/100	64/100
3 Stage 3: Which Method has the fewest essential methodological requirements that cannot be met by my evaluation / intervention? (Which method is most feasible to use?)	0	1	0	1	2	1	4	3	1	3	1	1	1	1	1
4															

2. [UK Government Magenta Book.](#)
3. [Qualitative Evaluation checklist \(Michael Quinn Patton\)](#)
4. [Combine qualitative and quantitative data | Better Evaluation](#)



Magenta Book

Central Government guidance on evaluation