

5.2.3. DESIGN A PROCESS FOR PLANNING AN EVALUATION PROJECT.



Co-funded by the
Erasmus+ Programme
of the European Union



Concha Maza
La Cultora

Code n. M5 Unit2 SU2.3



Summary

Overview

Aims & objectives
What you will learn -
LO
Keywords and terms
Background

Section 3

Practical tools for:
strategic steps;
manage, define and
frame

Section 1

**Measurement as
Learning**
Mapping the journey:
strategy, data &
people

Section 4

Open Questions & Tips
Open questions & reflection
Tips
Key takeaways

Section 2

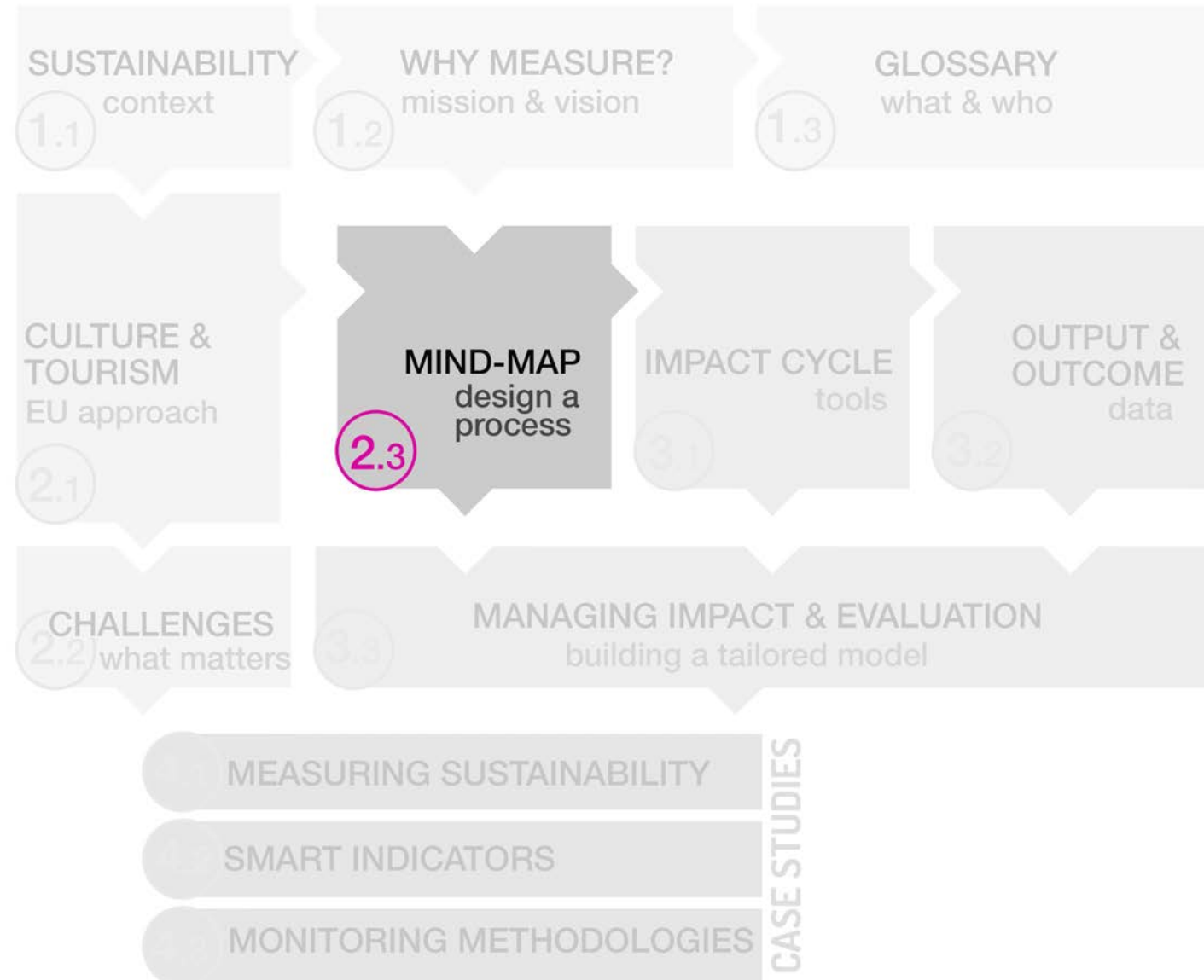
**Clarifying what
success looks like**
Evaluator as a
facilitator

Closing section

To continue your
learning
List of references
Author's names &
credits

Aim & objectives

- The first approach has to answer the question of what the success of our institution or project would look like, what is **the change** we want to achieve, so that we **can imagine what we have to measure.**
- As we go into the tools that will help us to measure we will need to answer, how decisions will be made? What will be evaluated? And how decide the purpose and what are the key evaluation questions?





What will you learn. Learning outcomes

At the end of this presentation, you will be able to:

- Learning outcome 1: Recognize the entry barriers in different areas and in particular in the management of cultural heritage.
- Learning outcome 2: Construct a mind map of the theoretical process to build a sustainable measurement culture with a long-term vision.
- Learning outcome 3: Describe the professional training journey to reach the state of knowledge and competences to develop a measurement project.

Keywords & terms

Measurement process

Measurement as learning

Intended Impact

Facilitator

Decision making matrix

Key evaluation questions



Background

Once we understand the context and the resources we count on, we have to face up to measurement.

Design the process needed to develop an evaluation project, define the stakeholders, plan the purpose and scope, and define the steps needed to achieve the knowledge and skills to plan and implement a measurement program.

From this we build our tailored impact measurement and monitoring project.



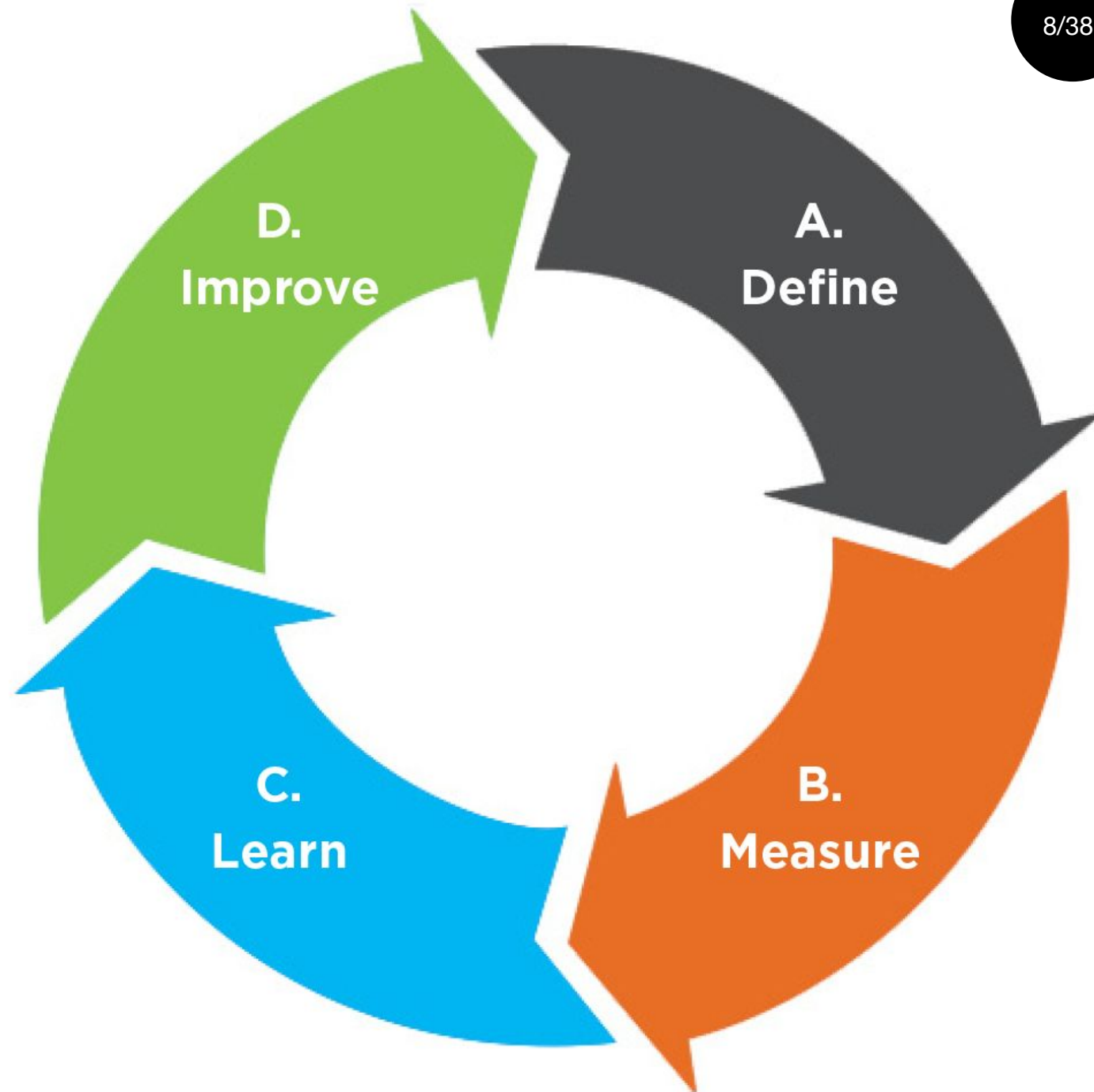
SECTION 1

Measurement as Learning



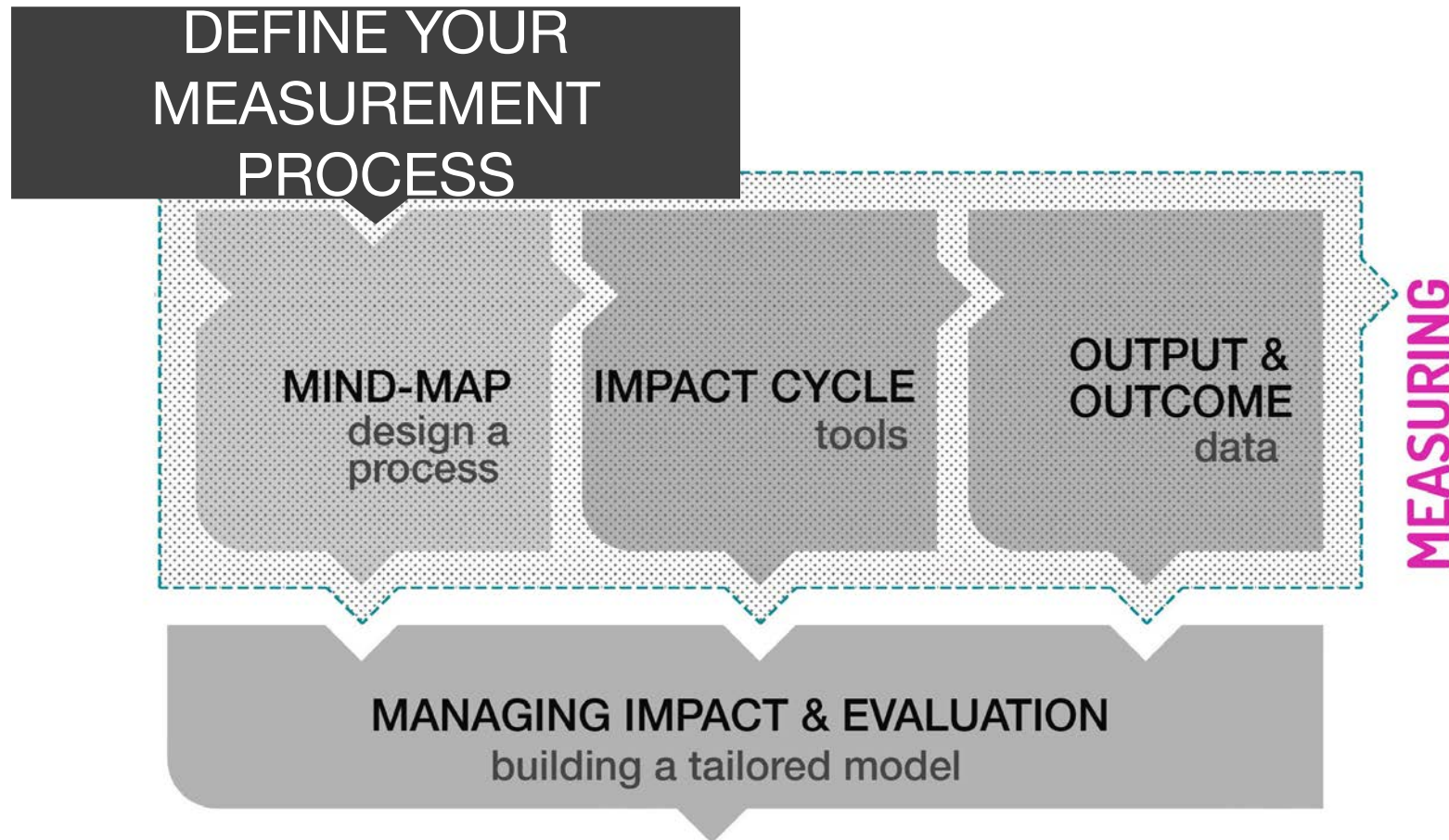
Resource: The Bridgespan Group. Measurement as Learning.

<https://www.bridgespan.org/insights/library/performance-measurement/measurement-as-learning>



Mapping the journey

Design the process, understand the measurement cycle and select tools to obtain the right data and evidence



Measurement as Learning

Open resource. The Bridgespan Group:

We must look for tools to understand the purpose. We also need to know our level of performance and detect who will use this information to make an improvement.

[About Us](#)[Services](#)[Stories of Impact](#)[Insights](#)

Lesson One: Begin with the end in mind^[vi]

Lesson Two: Anchor measurement in your theory of change

Lesson Three: Create a culture of measurement

Lesson Four: Ensure that all contributors benefit

Lesson Five: Get better at measurement over time

OER: Further resources: The Bridgespan Group. Measurement as Learning.

<https://www.bridgespan.org/insights/library/performance-measurement/measurement-as-learning>



Measurement as Learning

Strategy, Data and People.

1. **Begin with the end in mind**

who or what ends our organization serves?

what change we seek to create, when?

PURPOSE

2. **Create a culture of measurement**

Does the leadership of our organization use data to make decisions?

Have you created the right forums for staff to use the data to drive improvements?

EVIDENCE-BASED
CULTURE

3. **Ensure all contributors benefit**

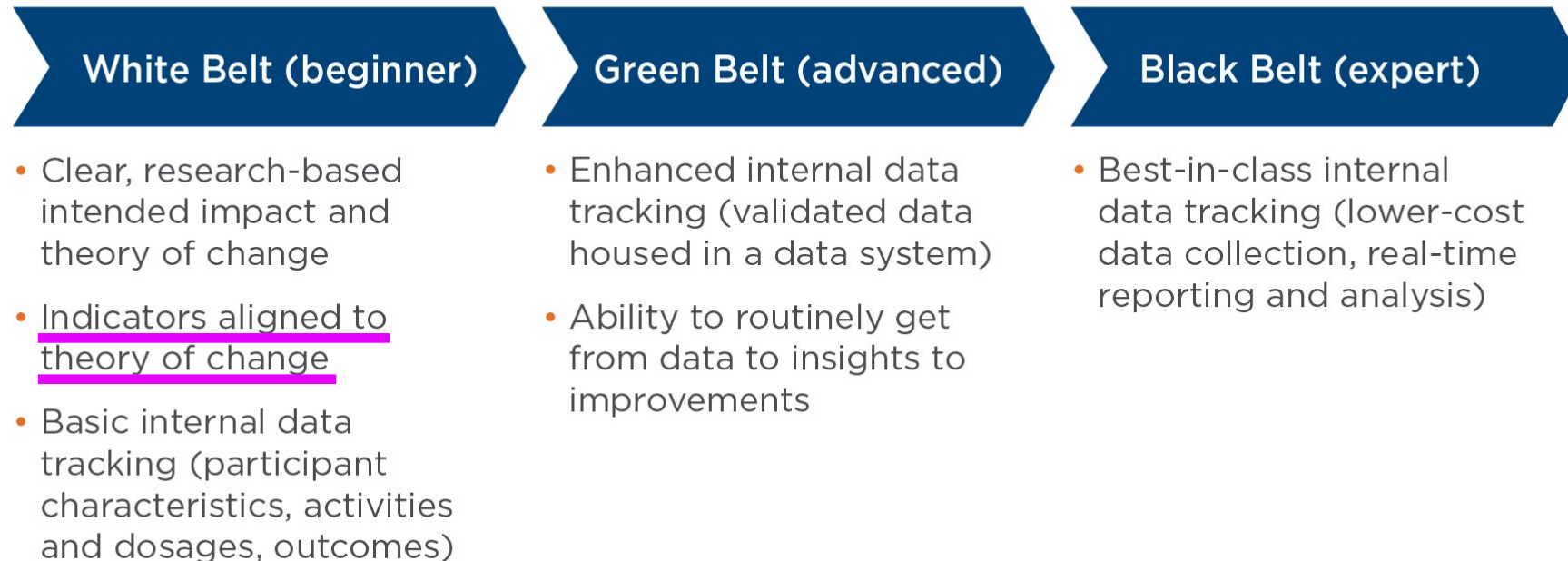
Have we identified each player that contributes to or uses the measurement system and how they gain value from it?

INTENDED USERS

Measurement as Learning. Mapping the journey

Moving from theory of change and basic tracking to collecting evidence on a routine base for insights and improvements.

How performance measurement should evolve over time



Resource: The Bridgespan Group. Measurement as Learning.

<https://www.bridgespan.org/insights/library/performance-measurement/measurement-as-learning>

SECTION 2

Clarifying what
success looks like



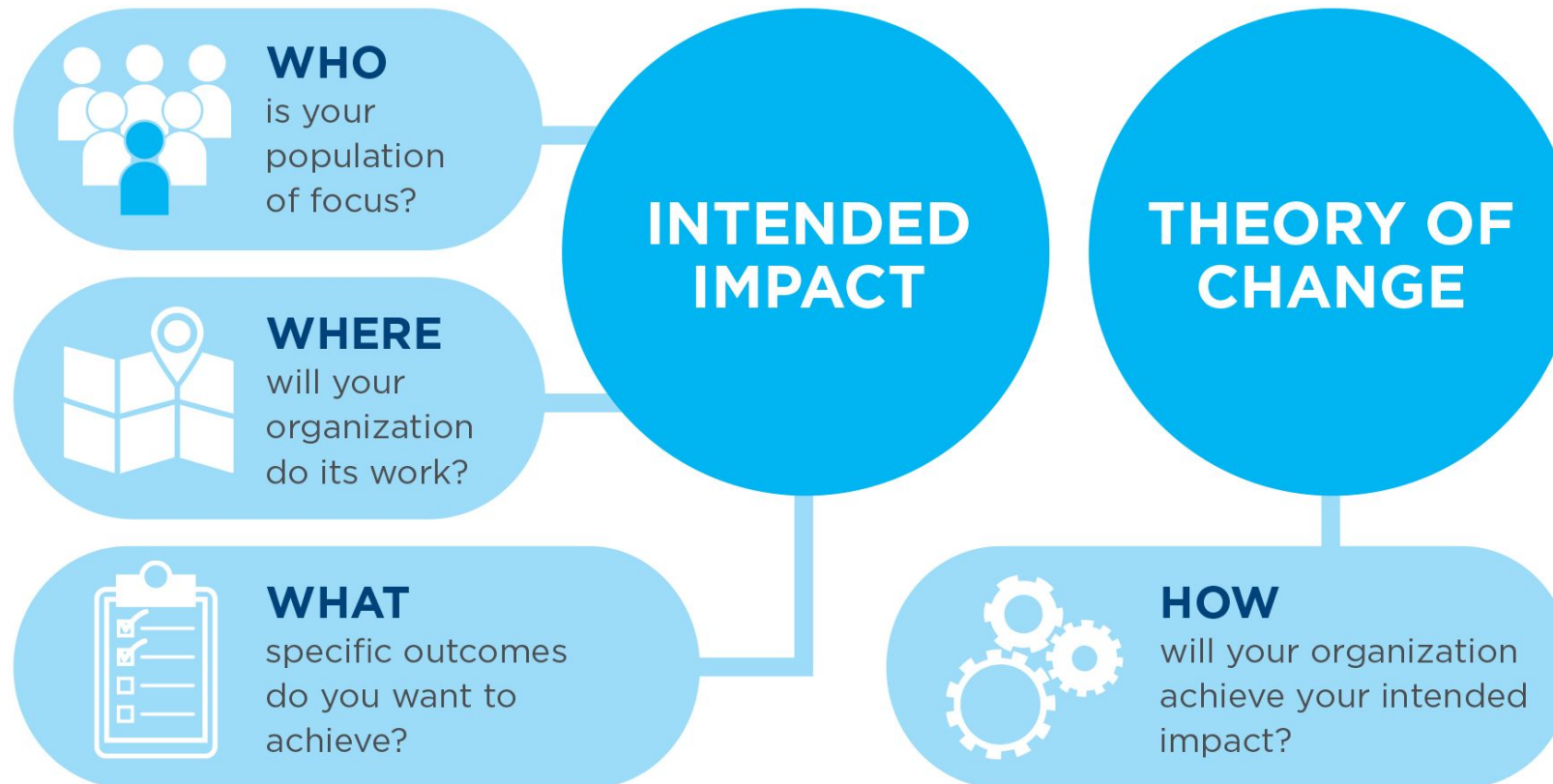
The happy museum. Story of Change

<https://happymuseum.gn.apc.org/story-of-change/>



Clarifying what success looks like

First level indicators should be aligned with the expected change.
A first approach to frame this theory is by answering questions.



Source: The Bridgespan Group

Resource: The Bridgespan Group. What Are Intended Impact and Theory of Change.

<https://www.bridgespan.org/insights/library/strategy-development/intended-impact-and-theory-of-change>



Clarifying what success looks like

Who does the organization serve, and what change does it seek to create?

How do you get a Good Discussion Going?

To Clarify an Organization's Intended Impact Ask:

- Who are our beneficiaries?
- What benefits do our programs create?
- How do we define success?
- What won't we do?
- What would make us obsolete?

Resource: The Bridgespan Group. Zeroing in on Impact.

<https://www.bridgespan.org/insights/library/transformative-scale/zeroing-in-on-impact>

Clarifying what success looks like

For developing this process of questioning, the role of the coordinator is key as a professional with soft skills rather than technical.

His or her profile is close a facilitator, since part of the success is related to involving people, observing evidence or simplifying a complex reality.

The Evaluator as Facilitator: Considerations for Good Facilitation Practice



10th February 2021 by [Ijeoma Ezeofor](#)

"For evaluators, there is a high price for bad facilitation: Without our knowing, we may favor our own priorities, forget participants' needs, submerge stakeholder voices, hide underlying causes, and undermine the impact of our work..."

- Dr. Rita Fierro, CEO
of Fierro Consulting, LLC and Past AEA Board Member



OER: Resource: Better evaluation. Blog.

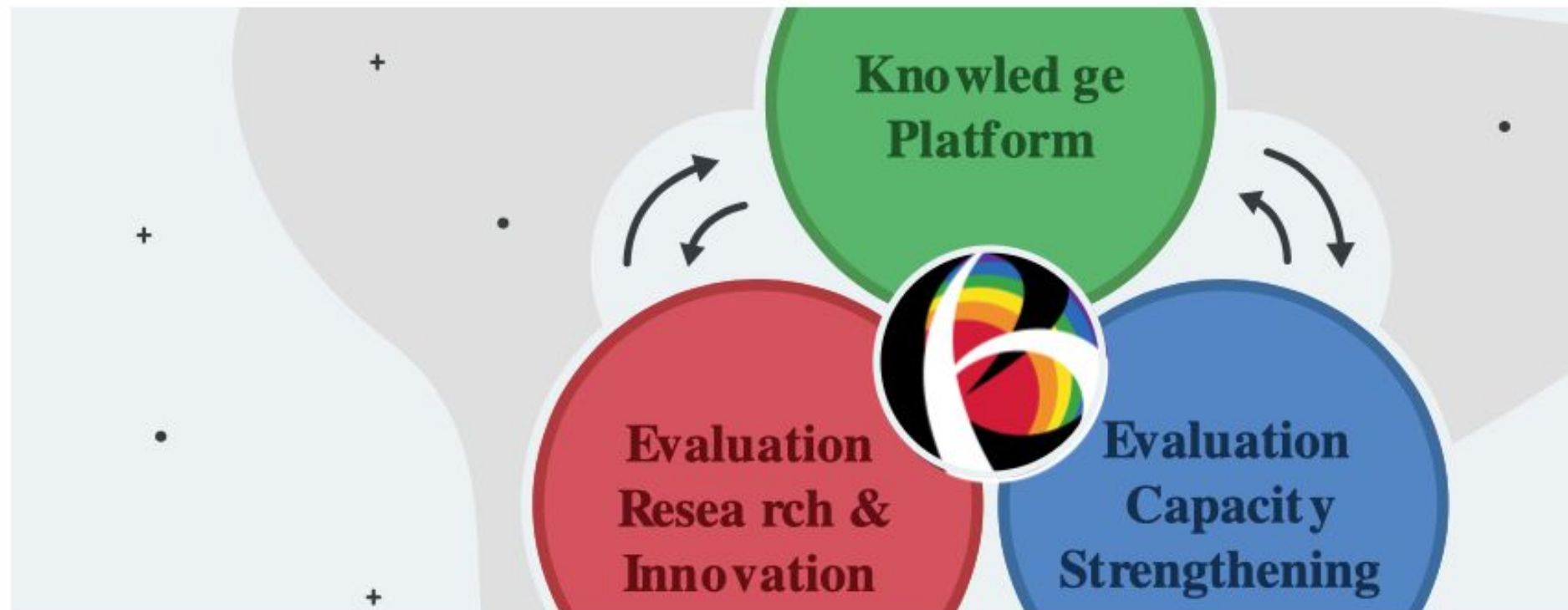
SECTION 3

Practical tools for:

strategic steps: manage,
define and frame



About BetterEvaluation



Our vision is a world of better evaluation, better decisions, and better impact.

BetterEvaluation is a not-for-profit organisation and registered charity that operates globally.

Our mission is to work collaboratively with our global community to create, share and support use of knowledge about how to better plan, manage, conduct and use evaluation.

BetterEvaluation: measurement tools repository

Manager's guide to evaluation: a step-by-step guide that organises the tools according to the logical development of the process.

STEPS IN THE COMMISSIONING PROCESS

1. Decide how decisions about the evaluation will be made
2. Scope the evaluation
3. Develop the Terms of Reference (ToR)
4. Engage the evaluation team
5. Manage development of the evaluation methodology
6. Manage development of the evaluation work plan including logistics
7. Manage implementation of the evaluation
8. Guide production of quality report(s)
9. Disseminate reports and support use of evaluation

BetterEvaluation: measurement tools repository

Searching for strategic tools: an index of the tools according to the nature of the tasks carried out in monitoring and evaluation.



Further resources: Methods and processes. Rainbow Framework.
https://www.betterevaluation.org/en/rainbow_framework

BetterEvaluation: measurement tools repository

Searching for strategic tools: first steps



MANAGE an evaluation or M&E system

Decide how the evaluation or the M&E system will be managed, including clarifying stakeholders, roles and decision making processes, and ensure processes for these are transparent and well-managed.

[Click to view evaluation tasks for MANAGE](#)



DEFINE what is to be evaluated

Develop a description (or access an existing version) of what is to be evaluated and how it is understood to work.

[Click to view evaluation tasks for DEFINE](#)



FRAME the boundaries for an evaluation

Set the parameters of the evaluation—its purposes, key evaluation questions and the criteria and standards to be used.

[Click to view evaluation tasks for FRAME](#)

MANAGE: Decide how decisions will be made

In the project implementation, it is essential to decide how decisions will be made and how the monitoring of the evaluation process will be developed.

In defining the evaluation team, it is necessary to decide on roles, responsibilities and the type of decision-making.

Step 1

Decide how decisions about the evaluation will be made

Decide how decisions will be made on: the focus of the evaluation; choosing the evaluator / evaluation team; approving the evaluation design; approving evaluation reports and who can access the final report(s) and data.

Read More

Sub-steps:

- Identify who will be involved in decisions and what their roles will be
- Specify responsibilities of the evaluation manager and the evaluator(s)
- Address particular evaluation management issues relating to joint projects, including donor partnerships

OER: Further resource: Better Evaluation. Decide how decisions will be made
https://www.betterevaluation.org/en/commissioners_guide/step1

MANAGE: Decide how decisions will be made

Choices about voices: Considering aspect of participation
Decide who involve, when and how

SHARING	The people whose voice matters.	STAKEHOLDERS.
LISTENING	The people who have the power over implementation and strategies.	MANAGER, steering group, technical advisory...
HANDS	Those open to taking action and create the space to enable sharing, listening and acting.	INTENDED USERS.

MANAGE: Decide how decisions will be made

Decision making matrix: Who might be involved in making decisions?
What will be their role?

	Technical advisory committee	Evaluation steering group	Program manager	Senior management
Focus of evaluation	Consulted	Recommends	Approves	Informed
Selection criteria for evaluator/evaluation team	Consulted	Recommends	Approves	Informed
Choosing evaluator/evaluation team	Consulted	Approves	(included in steering group)	Informed
Evaluation design	Consulted	Approves	(included in steering group)	Informed
Evaluation report	Consulted	Approves	(included in steering group)	Informed
Release of report and data	Consulted	Consulted	Recommends	Approves

Resource: Better evaluation. Identify who will be involved in decisions and what their roles will be.

<https://www.betterevaluation.org/en/node/5275>



MANAGE: Key role of the evaluation manager or team

Access to info – strategic vision – supervision – reporting

- Ensuring access to relevant project.
- Have a clear understanding of the scope.
- Develop a plan, create milestones and deliverables.
- Problem-solving.
- Provide feedback and monitoring.
- Train data collectors.
- Provide info to all staff.
- Oversee implementation.
- Present findings.

DEFINE: scope the evaluation

Once we have detailed who is part of the evaluation, the next steps are to be clear about what the purpose is.

And therefore the design of a project, which has a rationale, a scale, a time frame, and actors and their roles.

Step 2 Scope the evaluation

Take the time to consider carefully what the evaluation needs to do before considering possible designs. Ensure all those who need to be consulted during this process are adequately involved.

Read More

Sub-steps:

- Clarify what will be evaluated
- Describe the theory of change
- Identify who are the primary intended users of the evaluation and what will they use it for
- Develop agreed key evaluation questions
- Decide the timing of the evaluation

Resource: Better evaluation. Scope the evaluation.
https://www.betterevaluation.org/en/commissioners_guide/step2

DEFINE: scope the evaluation. Key priorities

Purposes of assessment. Six major reasons to monitor, assess and report performance

TYPES OF INTERVENTIONS

- **To improve projects**
- To build capacity and promote civic engagement
- To demonstrate results and social return on investment (SROI)
- **To inform strategy**
- To sustain legitimacy across stakeholders
- To inform society

OER: Further resource: Keystone.Themes. Purposes of

assessment <https://web.archive.org/web/20120616015325/http://www.keystoneaccountability.org:80/analysis/purpos>

DEFINE: scope the evaluation. Types

Feasibility of the evaluation design. Timing and scale

TYPES OF EVALUATION	Before implementation	Needs assessment
		Evaluability assessment
		Evidence synthesis
	During implementation	Monitoring
		Process evaluation
	After implementation	Impact evaluation
		Value for money evaluation
		Sustained and emerging impact evaluation

FRAME: evaluation methodology

An evaluation design describes how data will be collected and analysed to answer the Key Evaluation Questions.

Step 2 Scope the evaluation

Take the time to consider carefully what the evaluation needs to do before considering possible designs. Ensure all those who need to be consulted during this process are adequately involved.

- Clarify what will be evaluated
- Describe the theory of change
- Identify who are the primary intended users of the evaluation and what will they use it for
- Develop agreed key evaluation questions
- Decide the timing of the evaluation

Step 5 Manage development of the evaluation methodology

An evaluation design describes how data will be collected and analysed to answer the Key Evaluation Questions.

Resource: Better evaluation. Manage development of the evaluation methodology. https://www.betterevaluation.org/en/commissioners_guide/step5



FRAME: evaluation methodology

Develop agreed key evaluation questions: A useful tool for deciding both the scope of the evaluation and the methodology

3. Specify the key evaluation questions

What are the high level questions the evaluation will seek to answer? How can these be developed?

This task does not have specific options but does have resources to help guide you. In addition, be clear about the different types of questions you want the evaluation to answer:

Descriptive question - what has happened? what is the situation?

For example - Where has the program been delivered? What changes have occurred for participants?

Causal question – what caused or contributed to the results?

For example - What were the outcomes and impacts of the program? What other factors contributed to achieving these outcomes and impacts?

Synthesis question – is this good? In what ways could it be better? Is it the best option?

For example -Did service delivery comply with agreed standards? Was the program cost-effective? What were its strengths and weaknesses?

Action question – what action should be taken?

For example -Should the program continue? What changes should be made to the program? Should it be scaled up?

OER: Further resource: Better evaluation. Consider important aspects of the evaluation.

<https://www.betterevaluation.org/en/node/5295>

SECTION 4

Hints & open questions



Measurement as learning & tools to place in context

A._Strategy, Data and People.

1. Begin with the end in mind

who or what ends our organization serves?

PURPOSE

2. Create a culture of measurement

Does your organization use data to make decisions?

EVIDENCE-BASED CULTURE

3. Ensure all contributors benefit

Have we identified each player that create?

INTENDED USERS

B._Tools: who does the organization serve, and what change does it seek to create?

MANAGE: How decisions will be made? Who, what and how. -**Decision making matrix**

DEFINE: What will be evaluated? How to decide purpose. -**Types of interventions. Timing and scale**

FRAME: What are the high level questions the evaluation will seek to answer? -**Key evaluations questions**



Tips

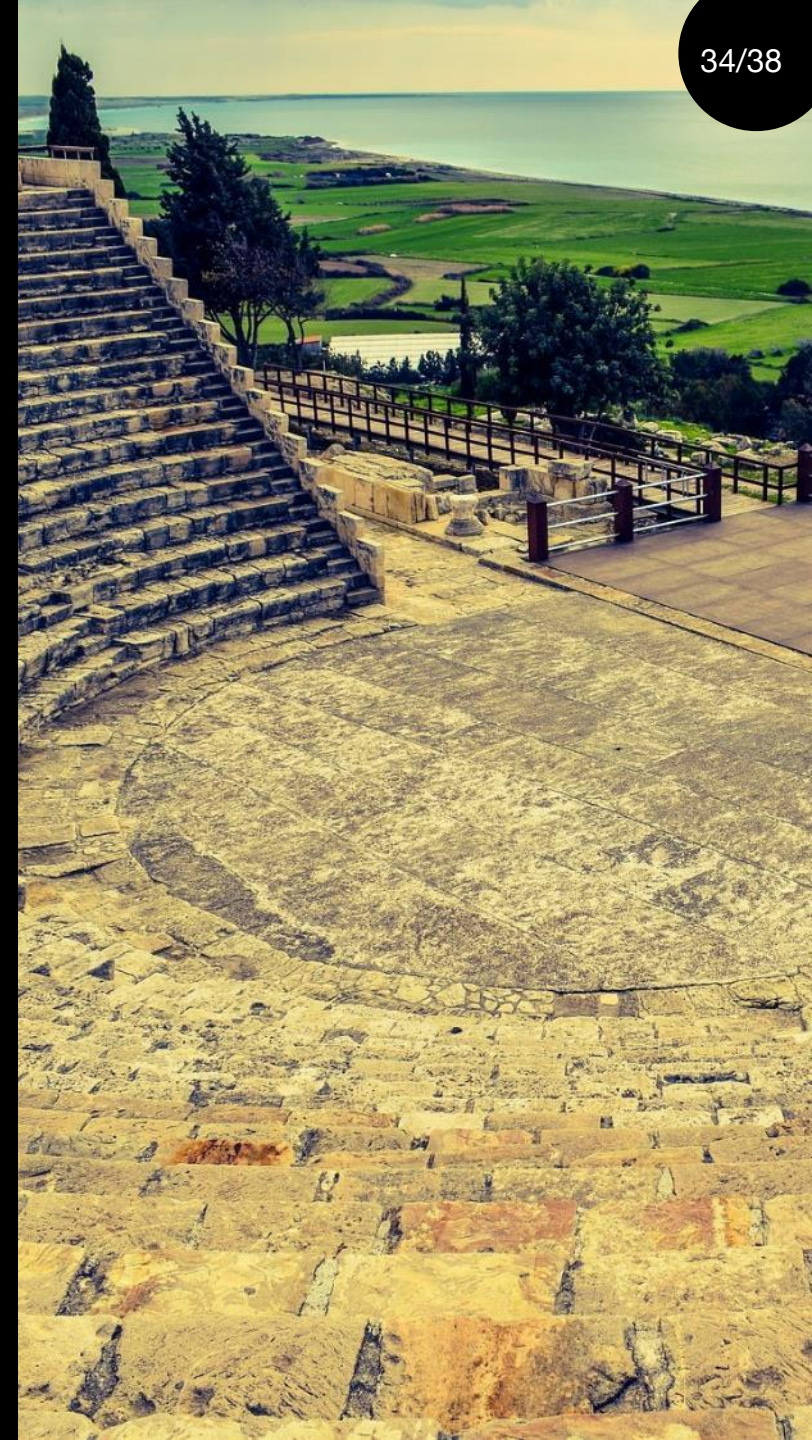
Measurement should be understood as a continuous learning process to incorporate changes in management. The idea is to analyse in order to take action.

First step is to have trained professionals with skills to be able to facilitate the process. Clarity in defining the process and scope of the project is essential for all measurement efforts to be effective. We need to answer:

- What will be evaluated and how?
- What evidences are we already working with?
- How are the stakeholders?

Key takeaways

Once we know where a case study is in its measurement journey and where the resources are, we can start building the project with concrete tools to measure and





Closing section

List of references

OER: Further resources: The Bridgespan Group. Measurement as Learning.

<https://www.bridgespan.org/insights/library/performance-measurement/measurement-as-learning>

OER: Resource: Better evaluation. The Evaluator as Facilitator: Considerations for Good Facilitation Practice.

<https://www.betterevaluation.org/en/blog/evaluator-facilitator-considerations>

OER: Further resource: Keystone. Themes. Purposes of assessment

<https://web.archive.org/web/20120616015325/http://www.keystoneaccountability.org:80/analysis/purposes>

To continue your learning

In the following steps, we will go into the measurement tools and create a tailor-made process for each case study.





Author's & Credits

Concha Maza Luque
La Cultura

concha.maza@lacultura.org

She is president and co-founder of the non-profit association La Cultura.

Currently its main lines of work focus on; training through entrepreneurship and new skills, social innovation through sustainability and social value, and applied research on citizen participation, user experience and collaborative environments.





Co-funded by the
Erasmus+ Programme
of the European Union

Project Number
601073-EPP-1-2018-1-IT-EPPKA2-SSA

This Project has been funded with support from the European Commission. This publication reflects the views only of the autor, and the Commission cannot be held responsible for any use which may be made of the information contained therein.



This work is licensed under a Creative Commons

Attribution-Noncommercial-ShareAlike 4.0 International
License
(CC BY-NC-SA 4.0)

www.euheritage.eu

