LEARNING FROM PRACTICE:

DEVELOPMENTAL EVALUATION IN PRACTICE: TIPS, TOOLS, AND TEMPLATES

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Developmental evaluation was created to evaluate innovative programs that operate in complex environments and are thus expected to adapt over time. The Developmental Evaluation Pilot Activity (DEPA-MERL) under the U.S. Global Development Lab's Monitoring, Evaluation, Research, and Learning Innovations (MERLIN) program at the United States Agency for International Development (USAID) is testing the effectiveness of developmental evaluation in the USAID context.

The DEPA-MERL consortium consists of Social Impact (prime), Search for Common Ground, and The William Davidson Institute at the University of Michigan.

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Congratulations, you are getting ready to conduct a developmental evaluation! Many of the available developmental evaluation resources focus on theory rather than practical experience. The DEPA-MERL consortium has documented early lessons learned from its experience and is pleased to offer guidance for organizations, managers, and evaluators that seek to implement this approach.

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STARTING a Developmental Evaluation Off Right

Conducting a developmental evaluation usually entails a substantial resource investment, so it is important to set the stage for success. This document includes guidance for developmental evaluation managers to preempt common pitfalls.

Assess DE Readiness

Interest in developmental evaluation is increasing among many evaluators and non-evaluators alike. However, it is not right for all contexts. While developmental evaluation originated to serve complex, innovative programs, it can only do so successfully when the organizational context is appropriate. To determine whether this is the case, consider using resources such as the Spark Policy Institute's Developmental Evaluation Readiness Assessment tool. Assess whether the contracting mechanism, organizational culture, personalities, and program scope are amenable to adaptation or whether another evaluation approach is more suitable. If interested organizations are not sufficiently "ready," the developmental evaluation may ultimately fail to serve its intended purpose(s). Be open to the fact that developmental evaluation may not be the right fit, and be ready to propose alternative evaluation approaches.

Develop a Storyboard...

Developmental evaluation is an intentionally nebulous concept and can take many forms. It is critical to get stakeholders on the same page early on about what the developmental evaluation will accomplish, how, and when. If possible, conduct a scoping trip. To the extent possible, gather stakeholders in a room for at least one full day to discuss the different visions people have for the developmental evaluation and how those visions can be reconciled with available resources and differing needs (for more on this, see *"Getting Evaluators Ready to Launch a Developmental Evaluation"*) on page 16.

Given developmental evaluation's premium on generating useable information, be sure to identify priority needs, decision points, key questions, and themes that the developmental evaluation should touch upon. Equally important is the need to assess the potential risks associated with these items. Set common expectations around what the developmental evaluation will and will not cover at the outset as well as around the initial roles and responsibilities of developmental evaluation stakeholders.

...But Don't Over Plan

While the storyboarding component is important, it is equally important not to get overly attached to a particular vision of the developmental evaluation. Developmental evaluations are meant to support adaptation of programs; likewise, the developmental evaluation should be adaptive in and of itself. While it is helpful to develop a work plan that lays out preferred tasks, timing of data collection, and analysis events needed to answer research questions; recognize that the program's priorities (and thus the evaluation's priorities) may shift over time, which can have myriad consequences for the developmental evaluation. As such, work plans should be living documents, updated on a regular basis. It may not make sense to spend the time developing a detailed work plan more than a few months out. Nevertheless, it is helpful to ensure all stakeholders agree at the outset with respect to the initial priorities or focal areas of the developmental evaluation.

Find the Right Evaluator

The quality of the developmental evaluation will be contingent upon the skillset of the evaluator who conducts it. The skills needed for developmental evaluations are similar, but distinct, from those needed for traditional evaluation. See *"Identifying Potential Evaluators"* (page 9) for additional information on how to identify the right person for the job. If the right person cannot be found, consider—in collaboration with key stakeholders—what steps to take to fill skill gaps, such as hiring a team of evaluators, or whether it is worthwhile to conduct a developmental evaluation with a less suitable candidate.

Manage Expectations

Oftentimes, stakeholders are new to developmental evaluation. They may need coaching about the differences between developmental and traditional evaluation and, by extension, how to interact with the developmental evaluator(s). This "acculturation" does not occur through the course of one meeting, but rather is an ongoing process in which the evaluator(s) must carefully manage expectations. Stakeholders may be overly skeptical or optimistic about what the developmental evaluation can deliver. In order to avoid scope creep and possible disappointment, clarify with stakeholders what is manageable for the developmental evaluation given the agreed upon priorities and available resources, especially time and budget.

IDENTIFYING Potential Evaluators

Hiring the right developmental evaluator is critical, but this is much easier said than done. As you begin planning a developmental evaluation, you might be asking yourself, "What essential qualities does this evaluator need? Where do I begin looking for candidates? "How do I know whether I have found the right person?" This document includes guidance for people planning to manage a developmental evaluation in order to navigate the recruitment process successfully.

Starting Your Search for a Developmental Evaluator

Not sure what you are looking for? Start with this: any developmental evaluation needs evaluators who are credible to key program stakeholders and partners, as well as within the evaluation community. Credibility with such a range of people requires evaluation expertise, soft skills, and preferably experience related to the program's focal areas. One of the first steps to take is to develop a comprehensive, yet flexible job description or Terms of Reference (TOR). Skills that are particularly important include:

- *Qualitative skills*: Given the need for developmental evaluations to explore unknowns, qualitative research skills are necessary. It is important not to underestimate the power of a rigorous qualitative study to unearth the nuance and 'whys' necessary to implement a successful developmental evaluation. Methodological skills encompass both the ability to develop strong instruments and to collect relevant data. A solid analytical background is also necessary in order to translate findings into learnings for the program.

- *Ability to communicate effectively with various audiences*: Developmental evaluator(s) must effectively channel findings relevant to the developmental evaluation's learning objectives, including use of different approaches to get information to different individuals. Developmental evaluators should have strong cross-cultural and interpersonal skills. Open communication is critical; a developmental evaluator should also be an active listener.

- *Learning orientation*: The developmental evaluator often serves in a learning role that the program team may not have the capacity to adopt on its own. Previous experience facilitating learning and adaptation—and familiarity with the associated challenges of such work—is central to the success of a developmental evaluator. Likewise, self-learning is an important quality; the term "reflective practice" refers to a data collection approach in which the evaluator continually reflects on her or his own contribution and role in relation to a program's contexts and processes.

- *Other skills*: Depending on your evaluation, quantitative skills, experience with a certain donor or client, sector-specific expertise, data visualization skills, or other skill sets may be particularly relevant. Think about what this evaluator or team will need to be perceived as credible and useful, especially by the evaluation stakeholders. Feel free to include those in your job description or TOR.

- Make sure your job description or TOR addresses each of these items and also recognizes that they are suggestions rather than strict requirements. People who meet all of the desired criteria are hard to find, thus it is important to avoid discouraging otherwise strong candidates. For an example of a TOR, see page 12.

Sourcing Developmental Evaluators

Having trouble finding a developmental evaluator? Consider the following:

- **Start early and be patient with the process.** Finding someone with the right skills and fit is a challenging process that can take months. It is important to begin early, even if the details of the evaluation's scope and budget are still under negotiation. Begin "soft recruitment" (i.e. networking and conducting informational interviews) as soon as possible, letting prospective candidates know that requirements or timelines may be subject to change. Even if you are not actively recruiting for a specific opportunity, building a roster of potential candidates over time saves a great deal of effort down the line. Do not get discouraged if you do not find the ideal person right away.

- **Post your job description or TOR widely.** Share it on LinkedIn and among evaluation networks, such as the American Evaluation Association, PELICAN, and DM&E for Peace. It is also helpful to post on sites for traditional recruitment.

- **Circulate it within your network!** Networking is a significant boon to the process and helps identify reliable evaluators. Having worked with someone before or having a strong and trusted recommendation, particularly related to a developmental evaluator's interpersonal and facilitation skills, is invaluable in the developmental evaluation recruitment process.

As noted in **"Starting a Developmental Evaluation off Right,"** (see page 7) you may want to consider hiring a team of evaluators or using another approach if you encounter considerable difficulty in sourcing developmental evaluators.

Screening Developmental Evaluators

How do you determine whether people with impressive resumes can actually deliver? Do you need to choose between two or more top candidates? You may want to consider incorporating the following into the interview process:

- *Make sure to probe the depth of candidates' M&E "toolbox":* While specialized skills or experience with a particular method, software, or tool may look advantageous, it is the depth and breadth of an evaluator's toolbox that positions them well to be a developmental evaluator. Experience implementing quantitative, qualitative, and participatory methods, as well as working with both monitoring and evaluation in complex environments, will enable the evaluator to adapt, be flexible, and meet the needs of the developmental evaluation no matter how the evaluation evolves.

- *Put top candidates through a simulation:* A simulation can be as simple as laying out possible scenarios during an interview and asking how the candidate would handle them. Examples of potential scenarios include how to deal with uncooperative stakeholders, how to facilitate adaptation without being the decision-maker, and how to share politically sensitive or negative findings with key stakeholders. If resources permit, an in-person simulation can be highly beneficial.

- *Seek and obtain approval by core developmental evaluation stakeholders:* Arrange for the top candidate(s) to meet and interview with the core stakeholders. Since interpersonal skills and relationships are key to securing initial buy-in for developmental evaluation as well as participation in the evaluation over time, it is helpful to gauge whether personalities match. A candidate interview also gives stakeholders a sense of ownership early in the process.

Such interview processes can take some time. You may want to factor in a few rounds of interviews into your recruitment plan.

Onboarding Developmental Evaluators

Be sure to develop an adequate support system. During recruitment, think about what the evaluator might need in order to get acquainted with the program and team. Consider developing a living work plan, beginning initial document review, and/or conducting early data collection, such as stakeholder mapping. Factor this range of onboarding activities into the hiring timeline. Make time for routine check-ins, brainstorming sessions, and provision of management or technical support. The person managing the developmental evaluator should—to the greatest extent possible—help establish the systems, processes, and relationships necessary to build the communication channels between evaluation users that will serve as a foundation for the rest of the evaluation.

SAMPLE Terms of Reference for Developmental Evaluator

[Background information on organization hiring evaluator and program to be evaluated]

Objective:

[Organization] seeks a skilled evaluator to design and implement a Developmental Evaluation (DE) of [program]. The DE will facilitate [main use/purpose of DE]. The DE will help stakeholders evaluate and learn in real time and capture that learning into a more comprehensive report about the progress and effectiveness of their efforts. This will guide both current and future programming priorities, including [examples].

Through the DE, various stakeholders would also be part of a kickoff/acculturation workshop and process, which would bring all the partners together to build buy-in to the DE process, a culture of learning and adaptability from the evidence collected throughout the DE, and familiarity with working with the developmental evaluator. This will enable a good start to the process, and a chance to bring the stakeholders together and on-board with the DE scope, approach, and stakeholder responsibilities.

A DE will also ensure rigorous documentation of the learnings throughout the process, enabling them to be shared and replicated. This documentation facilitates informed iterations within the program, revisiting decisions to try different approaches when desired, and supports other similar initiatives in their learning and approaches to collective impact and complex partnerships.

The DE will begin in [date] and last through [date]. [Organization] anticipates that the evaluator would sit with [organization/office location] throughout the life of the DE with travel as needed throughout to meet with partners or other stakeholders and/or collect additional data.

The developmental evaluator will have additional technical support from [organization, if applicable] throughout the implementation of the DE.

Responsibilities

The evaluator will have overall responsibility for the design and implementation of the DE and ensuring its quality. They will be responsible for the following:

- Facilitate an acculturation workshop for DE stakeholders, which will help to collaboratively conceptualize and develop the DE design and approach (learning framework, methodology, work plans, reporting, etc.)

- Develop a living work plan for the evaluation, including an agreed set of deliverables (which may change over time, depending on the needs of the program)

- Orient and manage other evaluation or data collection teams as they arise;

- Provide quality assurance of all deliverables, including regular intermediate report logs that track details of DE and document all events that occur (i.e. planned, unplanned, and associated outcomes) and the final report of the evaluation;

- Facilitate regular meetings with program leadership and M&E staff to collect data;

- Conduct analysis of the data collected and present digestible analysis regularly to program staff and key partners through data-review process and other participatory meetings; and

- Track and communicate high quality information to program staff and key partners on the program's progress that can inform timely and data-driven decision-making; and regularly record decision-making, program changes and/or changes in the environment in report log.

The evaluator will be supported by [people or organizations] and report to [relevant individual].

Qualifications

Required

- Programming and/or evaluation experience in international development [name relevant sector here if applicable];

- Extensive technical knowledge, skills and expertise in evaluation design, concepts, and approaches, and evaluating complexity, in particular;

  » Facilitation skills, particularly related to programmatic and organizational learning;

- Familiarity with Developmental Evaluation, including skills such as;

  » Respect for local stakeholders and partners, ethical research (maintains confidentiality and anonymity when required), flexibility, energy, humility, willingness to learn on the go, and ability to resolve conflicts.

- Strong analytical skills to support both qualitative and quantitative research;

- Excellent oral and written communication and report writing skills in English;

- Keen attention to detail, especially related to documenting data and associated processes;

- Graduate degree in Social Science, Organizational Theory/Behavior/ Communications, International Development, or related focus.

Strongly Preferred

- Leadership and strategic thinking skills;

- Active listening, proactive learning, and time management skills with readiness to be in a learning role;

- Previous experience and comfort with working for multiple stakeholders with competing priorities/interests; and

- Familiarity with [donor] organizational structure/ context.

The adaptive and uncertain nature of developmental evaluation can make budgeting a challenge. While it is impossible to know exactly what the evaluation will require, DEPA-MERL has found that budgeting for the following can help set the evaluation up for success:

- Level of effort for the developmental evaluator(s)
  - » Whether you have a full time embedded evaluator(s) or an internal staff member who conducts the developmental evaluation on a part time basis, it is essential to set aside budget for the activity. This should include time to:
    - onboard the evaluator (see **Starting a Developmental Evaluation Off Right**),
    - conduct any preparatory exercises
    - collect data
    - analyze data
    - prepare deliverables

- Level of effort for the support team
  - » As noted in "**Getting Ready to Launch a Developmental Evaluation,**" it is important to have a technical and/or managerial backstop to support the evaluator(s). This can even be one person if resources are limited, but ideally, the support team is robust.

- Acculturation workshop
  - » The most effective workshops are interactive ones, so be sure to have supplies that will encourage engagement with the material. Examples include projectors, poster paper, markers, sticky notes, etc. Depending on the size and context of the workshop, it may be necessary to rent space, serve refreshments, or provide a travel stipend to participants.

- Data collection
  - » Consider what kinds of data the developmental evaluation will need in order to answer the initial research questions. If they require large data sets, you may need to purchase secondary data or hire a data collection firm. If travel is required, include any associated costs in the budget. As you will not know everything you need upfront, plan for discretionary data collection costs that the team can use when new data needs come up as resources allow.

- Data analysis
  - » Budgeting time for analysis is important, but make sure that the evaluator has the right tools needed to do it well. This could mean qualitative or quantitative analysis software or surge support for data cleaning or coding.

Sample Budget Categories

Item	Description
Recruitment	
Labor	Cost of labor to identify and hire suitable developmental evaluator candidate(s)
Evaluation Kick-Off	
Labor	Cost of labor for developmental evaluator and support team to get on-boarded to program, facilitate acculturation workshop, and launch baseline data collection
Acculturation Workshop Expenses	Cost of developmental evaluator and support team representatives to travel to workshop (if applicable); cost of supplies, space rental, refreshments, etc. for acculturation workshop
Developmental Evaluator	
Labor	Cost of fulltime salary for developmental evaluator
Allowances/Living Expenses	Allowances, housing stipend, insurances, etc. for developmental evaluator (if applicable)
Travel Expenses	Travel expenses for developmental evaluator, e.g. relocation, visits back to headquarters, etc. (if applicable)
Data Collection Expenses	Discretionary budget for developmental evaluator to conduct additional data collection, e.g. hiring enumerators, translation of surveys, etc.
Management & Short Term Technical Assistance	
Routine Management Support	Cost of labor for managers to provide management support to developmental evaluator, e.g. logistics, admin, reporting, etc.
Routine Technical Support	Cost of labor for managers or other team members to provide technical and surge support to the developmental evaluator
Travel Expenses	Cost of visits to the field by managers/technical support team (if applicable)

After three months in their positions, DEPA-MERL asked two of its developmental evaluators to provide advice to others based on their experiences. Their answers, organized by theme, are below. This may be particularly useful to evaluators and also includes considerations for program managers.

Embedding Well: Build and Maintain Buy-In

In many developmental evaluation contexts, it is ideal to have a fully embedded evaluator--that is, someone who sits with the team that implements the program(s) being evaluated on a regular or fulltime basis. Consider the following when preparing for a context in which the developmental evaluator is fully embedded:

- Focus on creating and maintaining relationships with key stakeholders early on and interpersonal relationships as well. Be mindful of keeping an even level of engagement with all parties. Try to both remain objective internally as an evaluator and ensure that your actions are being *perceived* as objective by key stakeholders.

- Expectations for embedding should be clearly conveyed up front with all key stakeholders. Make sure there is agreement between the evaluator(s) and key stakeholders at the beginning of the developmental evaluation about communications, such as being included on emails or have a standing invitation to regular meetings. One DEPA-MERL developmental evaluator realized that even after several months into the evaluation, his work was still being perceived as external rather than as a part of the program. He found that it was necessary to explicitly and repeatedly communicate to his colleagues that he was to be fully embedded. For example, he would say to the program team "next week, I'd like to shadow you and be in your office."

- Show stakeholders the value-add of the developmental evaluation by not limiting your role to that of an observer. Try to become part of the program team by going to a few social events at the beginning, and conduct an informal interview with someone you know you want to engage later. When you do not have pointed questions, you can start with "tell me about your experiences" on the team or with a specific activity.

Documentation: How to do It Efficiently

Developmental evaluations require significant levels of documentation; for example notes regarding the progression of the program, decision making, and other data relevant to the research questions. Tips for how to managing those processes include:

- Plan out logistical components of how you're going to document meetings, interviews, and other data sources. Are you a fast typer? Try live transcription. Do you prefer to audio record? Invest in transcription software (taking non-native English speaking into account, some software may not pick up certain languages or accents.) Prefer to handwrite? Invest in a smart writing set that digitizes your handwritten notes with a smart pen. Perhaps a checklist or tally sheet might be enough for your needs. Think about who needs which types of data and your style of analysis.

- Develop shorthand so that when you go back, you can quickly grab key ideas. Consider taking a training on effective note-taking.

- Keep meeting logs and trackers to organize data as you collect it.

- Journal or maintain a daily reflective practice to capture key thoughts, evolving roles, interactions, or events, barriers and enablers to data collection and review, and risks associated with decisions.

One developmental evaluator found that live transcription is ideal for her. She types quickly, and live transcription allows her to capture nuance that shorthand can miss. Live transcription allows for rigorous data analysis if you have lots of qualitative data. After annotating the transcript with her observations on the day of a meeting, she can return to the document a few weeks later and analyze the transcript and her annotations with fresh eyes.

Managing Documentation: Systems that Support Rapid Retrieval

Retrieving information should be easy and efficient. Developmental evaluators can benefit from a system that is conducive to rapid retrieval of and access to documented information. When writing reflections, organizing a workshop, or preparing for an interview, a lot of time can be spent sorting through notes trying to find particular material. Plan ahead!

- Find a document management system that fits your work style, whether that is a cloud-based file storage system, offline storage on your computer, or physical notebooks.

- Think through, "How will I access this information? What will I be creating/producing? What will I be sharing with my team? What documents will be in constant reference?

- Systematize your file name typology for easy retrieval, and create a structure for data capture and analysis at the beginning. Design filing around the key activities, such as: Acculturation, Reporting, Key Reference Material, and Additional Reference Material. Set up qualitative analysis systems using software such as NVivo or Dedoose.

Every Embedded Developmental Evaluator Needs a Support Team: Setting Up Dependable Structures

To keep a developmental evaluator's work objective and utilization-focused, they need to have an independent support team. A developmental evaluation is always going to be ambiguous at the start, so wading through the waters with a dependable manager and technical team is crucial. It can be hard to see the big picture once a developmental evaluator is immersed in the details of work, so setting up routines early will help. For instance:

- Establish weekly check-ins and provide reflections of each week's activity.

- Develop ways to challenge your assumptions and inject objectivity. Share findings and identify assumptions with the goal of streamlining and refining analysis.

- Identify barriers and enablers to implementing the developmental evaluation and brainstorm and implement actions to mitigate barriers and enhance enablers.

Communicating Value Add Early: Prepare for the Acculturation Workshop

An acculturation workshop is a meeting of developmental evaluation stakeholders that seeks to 1) educate participants about what a developmental evaluation is and its potential benefits for the program; 2) refine research questions that the evaluation will explore and begin developing an evaluation work plan; and 3) establish common expectations, roles, responsibilities, and communication protocols among stakeholders to ensure everyone is on the same page. Acculturation workshops generate interest and buy-in for the developmental evaluation, which are critical to its ultimate success.

Given developmental evaluations' ambiguous, evolving nature, they might confuse or frustrate stakeholders. Tips for how a developmental evaluator can facilitate early buy-in at an acculturation workshop include:

- Develop a quality agenda and ensure high-caliber facilitation. Explain the methodology well from the start.

- Be consistent about creating and highlighting the added value of the developmental evaluation. The workshop is an opportunity to generate buy-in amongst stakeholders, who may still have reservations; post-workshop, you will have to produce value-add with some regularity and be clear about how the developmental evaluation will enhance the program.

- DEPA-MERL evaluators have used the acculturation workshops to showcase some "quick wins" that helped establish credibility:

  » One developmental evaluator created an unsolicited stakeholder network map early on, which helped him understand the program's context. Further, the powerful data visualization impressed the program stakeholders. Stakeholder maps may not be a formal deliverable, but they can streamline work, help ensure you understand the lay of the land, and may be seen as a value-add of the developmental evaluation.

  » One developmental evaluator conducted several pre-workshop key informant interviews to give her a sense of who was who and who knows what. She used this to effectively manage power dynamics during the workshop and build buy-in.

Though there is pressure to show that you are "adding value," rather than taking resources away from programming, do not feel compelled to push opinions too hard or too widely until you have the data to support your recommendations. Ask as many questions as you can. There will be a steep learning curve.

Avoiding Burnout: Manage Isolation

A fully embedded evaluator position is an incredibly exciting role. It can also have a uniquely challenging working environment: it can be isolating and typically requires a lot of absorption and note-taking. Consider the following pieces of advice from fellow developmental evaluators:

- You will observe a lot and hear a lot. You can start to feel like you have to solve every problem and do everything. Set a time for your own reflection and then STOP thinking about the developmental evaluation. Prioritize, guided by the research question or learning objective, break down how you are working towards that, and then set boundaries.

- Create momentum for yourself. A living work plan (i.e. one that is continuously updated and adjusted as the evaluation progresses) can keep you on task. Update it at a minimum once a week or as much as 2-3 times a week.

- You can feel disconnected as an embedded developmental evaluator. Some reflective questions to consider before you begin: How did you come into this job? Were you working on a team? Are you used to working alone? Set up personal expectations that your position will be different than whatever you had been doing previously.

Know that the DEPA-MERL consortium is working to create spaces for fully embedded developmental evaluators to learn from each other and work through tough situations together. Reach out if you are interested in participating or want additional information about running a developmental evaluation in practice. Please see contact information at the beginning of this guide.

Developmental Evaluation Tips
# TANGIBLE Products that Developmental Evaluations Can Generate

Some of the most frequent questions those commissioning developmental evaluations ask are: what will we get from this? What do products or deliverables look like? How can it help me? The answers are as frustrating as they are flexible: it depends on what you want! Below are some options of products and deliverables to get you and other stakeholders thinking about what might be useful.

Options Memo

Using a brief narrative and accompanying chart, an options memo lays out possible paths that stakeholders can take moving forward. You can add columns depending on your needs: implications, costs, rationale for the option, strategic advantages, or anything else you think might be useful! For example:

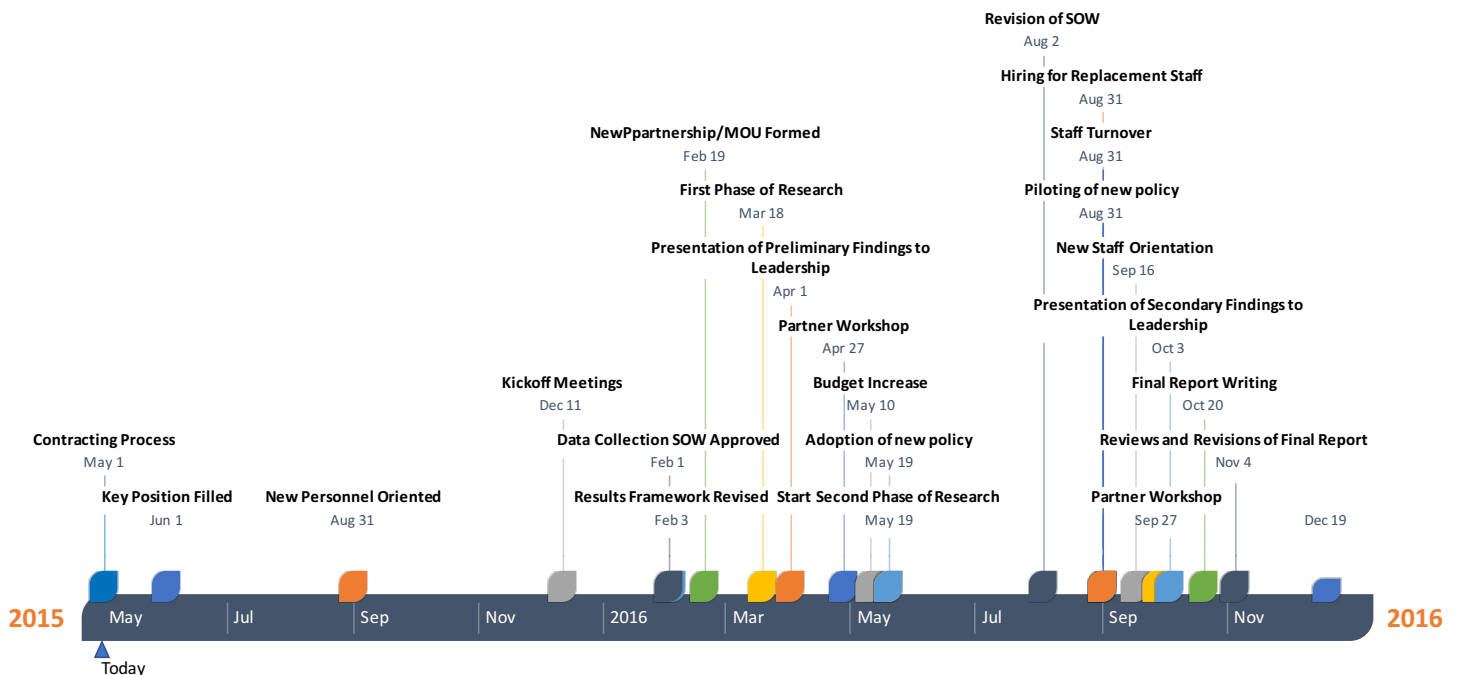|	Rationale for this Recommendation	Benefits to this Approach	Costs or Risks to the Approach
OPTION A			
OPTION B			
OPTION A + B			
OPTION C			
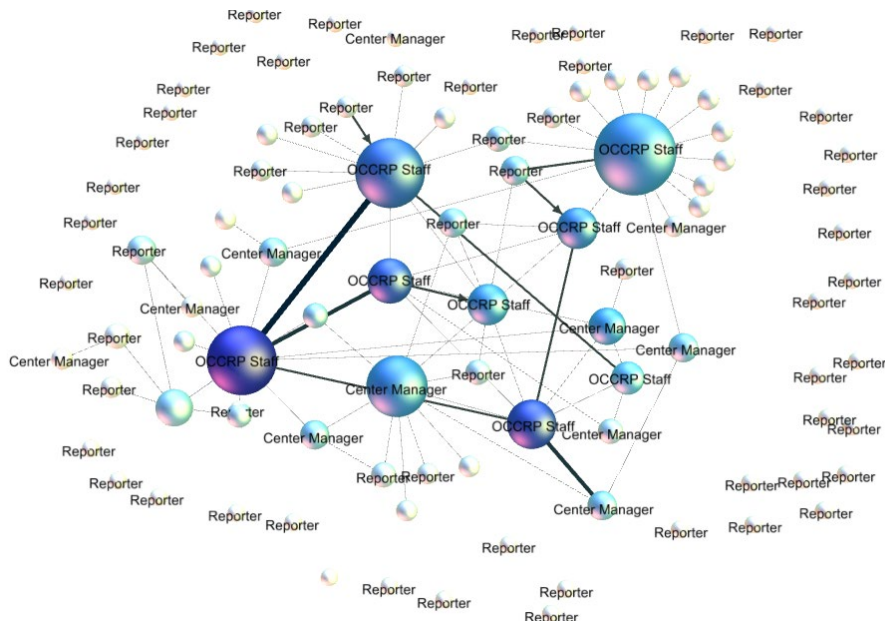
Network Map

Using document review, interviews, or a survey, create a network map of the different stakeholders and how they are related. Depending on information needs and depth of data, you can track information flows, centrality of actors, levels of trust, resource use, or other aspects of the relationships. These maps can also help track changes over time.

Timeline

Show how the project or process has changed over time. As a highly visual deliverable, this helps set context, ensure common understanding, and documents adaptation throughout the course of the developmental evaluation. Timelines can also be used to plan around key decision-making points and identify trends or patterns related to achieving milestones, including the time taken to make decisions.

Revision of SOW
Aug 2

Hiring for Replacement Staff
Aug 31

NewPpartnership/MOU Formed
Feb 19

Staff Turnover
Aug 31

First Phase of Research
Mar 18

Piloting of new policy
Aug 31

Presentation of Preliminary Findings to Leadership
Apr 1

New Staff Orientation
Sep 16

Partner Workshop
Apr 27

Presentation of Secondary Findings to Leadership
Oct 3

Kickoff Meetings
Dec 11

Budget Increase
May 10

Final Report Writing
Oct 20

Contracting Process
May 1

Data Collection SOW Approved
Feb 1

Adoption of new policy
May 19

Reviews and Revisions of Final Report
Nov 4

Key Position Filled
Jun 1

New Personnel Oriented
Aug 31

Results Framework Revised
Feb 3

Start Second Phase of Research
May 19

Partner Workshop
Sep 27

Dec 19

2015 | May | Jul | Sep | Nov | **2016** | Mar | May | Jul | Sep | Nov | **2016**

Today

SWOT Analysis Diagrams

As with general project design, a Strengths, Weaknesses, Opportunities, and Threats (SWOT) analysis can help synthesize information and present it to a variety of stakeholders in an easy-to-use format. Depending on your audience and purpose, use similar tools instead, such as force field analysis or a problem tree diagram.

| Strengths	Weaknesses
Opportunities	**Threats**

Learning Debrief

A very flexible tool, you can make a 1-2 page document showing what went well, what did not, and what you learned for consideration as the developmental evaluation continues. Include infographics and as much detail as your audience needs. A learning debrief can also be an activity conducted in-person, in which the evaluator facilitates the aggregation and dissemination of this information among a group of key stakeholders. In either case, the debrief can result in an action plan that lists out possible next steps with timelines and considerations for each of the steps.

Case Studies

Are you examining bright spots? Places where implementation is not working? Examples of positive deviance? Illuminating why a decision was taken and how it was implemented? Create case studies to present on paper, video, or another medium. For example, InsightShare has developed guidance on the use of Participatory Video as a tool for monitoring and evaluation.

Spider Charts

Are you assessing the performance metrics of a program? A spider chart can help provide a visual of data on various performance indicators as well as reveal areas of strength and weakness.
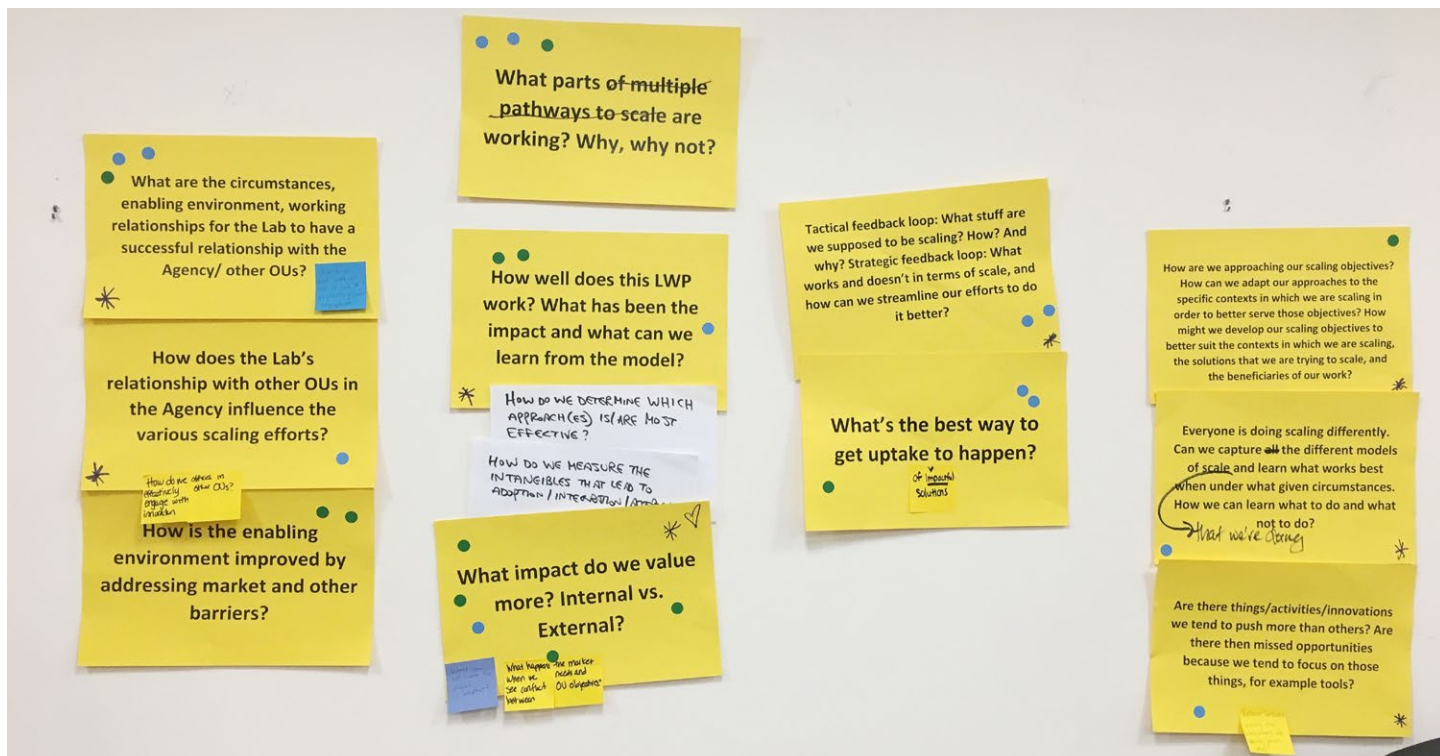
Findings (or Recommendation) Workshops

Many DEPA-MERL evaluators use a matrix to document and link findings, conclusions, and recommendations. Use findings as a basis for a workshop where stakeholders discuss how they interpret and analyze those findings and how the findings relate to one another. Then work together to determine some actionable recommendations, as well as who will be responsible for implementing them and by when.
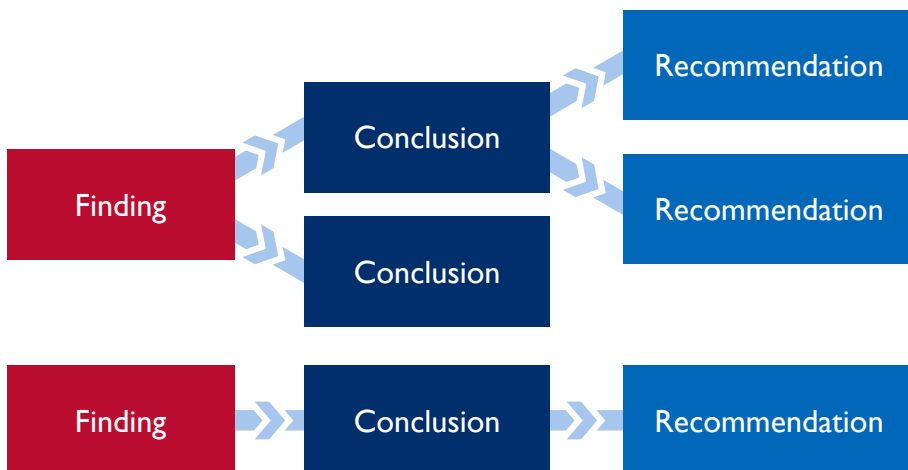
Toolkit

Once you have gathered initial learnings and implementation is on track, think about creating a simple toolkit for future activities or processes. What have you learned that others should replicate? What are tips on how to avoid common obstacles? Do you have specific tools, templates, or processes that all should follow moving forward? Document and disseminate!

NOTES

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