• Clear Outcomes, a Bixal company, is a woman-owned management consulting firm
• Solution-oriented monitoring, evaluation, research and learning support to international and domestic organizations
• Expertise in global health
• Mid-term evaluation of ASLM LabCoP project
Choose methods and processes

You need the right mix of methods to answer your evaluation questions and the right processes to plan and implement an evaluation. Choosing the most suitable methods or processes depends on the nature of what is being evaluated, the nature of the evaluation, and resources and constraints.
Overview

- Evaluation: framework
- Monitoring vs Evaluation
- Managing an evaluation
- A few tips and tricks
What is Evaluation?

Evaluation is a way of reflecting on the work that has been done and the results achieved.

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

“The systematic and objective assessment of an on-going or completed project, programme or policy, its design, implementation and results. The aim is to determine the relevance and fulfillment of objectives, development efficiency, effectiveness, impact and sustainability.” (OECD)
Evaluation seeks to answer a range of questions that might lead to adjustment of project activities, including:

- Is the program addressing a real problem, and is that problem the right one to address?
- Is the intervention appropriate?
- Are additional interventions necessary to achieve the objectives?
- Is the intervention being implemented as planned?
- Is the intervention effective and resulting in the desired change at a reasonable cost?
Types of Evaluation

Type:
- Process Evaluation
- Outcome Evaluation
- Impact Evaluation

Evaluator:
- External
- Internal
- Hybrid

Purpose:
- Formative
- Summative
Linking types of evaluation to the results framework

Baseline | Midterm | Endline
--- | --- | ---
Outcome | Impact

Process Evaluation

Inputs → Activities → Output → Outcome → Impact
## Key differences between Monitoring and Evaluation

<table>
<thead>
<tr>
<th></th>
<th>Evaluation</th>
<th>Monitoring</th>
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<tbody>
<tr>
<td><strong>Subject</strong></td>
<td>Usually focused on strategic aspects</td>
<td>Addresses operational management issues</td>
</tr>
<tr>
<td><strong>Character</strong></td>
<td>Flexible subject and methods</td>
<td>Systematic</td>
</tr>
<tr>
<td><strong>Frequency</strong></td>
<td>Periodic</td>
<td>Continuous</td>
</tr>
<tr>
<td><strong>Primary client</strong></td>
<td>Stakeholders and external audience</td>
<td>Program management</td>
</tr>
<tr>
<td><strong>Party conducting</strong></td>
<td>Can be external or internal</td>
<td>Internal</td>
</tr>
<tr>
<td><strong>Approach</strong></td>
<td>Objectivity; transparency</td>
<td>Utility</td>
</tr>
<tr>
<td><strong>Methodology</strong></td>
<td>Rigorous research methods, sophisticated tools</td>
<td>Rapid appraisal methods</td>
</tr>
<tr>
<td><strong>Primary focus</strong></td>
<td>Focus on relevance, outcomes, impact and sustainability</td>
<td>Focus on operational efficiency</td>
</tr>
<tr>
<td><strong>Objectives</strong></td>
<td>To determine outcomes or impact, verify developmental hypothesis, and document successes and lessons</td>
<td>To identify and resolve implementation problems and assess progress towards objectives</td>
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Better Evaluation Approach

**Rainbow Framework**

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

**Rainbow Framework overview and downloads**

- Manage
- Define
- Frame
- Describe
- Understand Causes
- Synthesise
- Report & Support Use
Step 3: Terms of Reference: GeneraTOR

GeneraTOR
Terms of Reference generator

Methodology
Once the overall evaluation design has been selected, the methods of investigation should be articulated and should be consistent with answering the evaluation questions, the intended users/uses, the principles and approaches as well as the budget and timeline for the evaluation.

The methodology section should specify as much detail as possible for each of the following:

Information sources / data collection instruments, protocols and procedures

Retrieving existing documents and data
- Formal policy documents, implementation plans and reports
- Official statistics
- Program monitoring data
- Program records
- Other

Collecting data from individuals or groups
- Interviews
- Questionnaire or survey
- Specialized methods
A few practical tips

Review previous evaluation activities/reports/TOR in your field

Think about evaluation activities at the beginning of your project: part of M&E plan

External evaluations: Have your evaluation partner on board at the start of the project

Budget is often the limiting factor

Use the Better Evaluation resources
A few practical tips continued

Evaluation design for outcome and impact evaluations – thinking about causation:

Check consistency with causal contribution

Investigate possible alternative explanations

Compare with a counterfactual

• Control group – randomized – gold standard – but rarely used in evaluations.
• Nonrandomized control: adjacent communities/geographies, general population
• Before after comparison: CAVE example next slide

A combination of different approaches that corroborate each other (triangulation)
**Before after design**

**Intervention:** Viral Load demand creation activity in May and June 2020 on social media among clients on ART in your province

**Measurement:** Proportion of people on ART due for a Viral Load test who received a viral load test (per month)
A few practical tips

**Use the results of the Viral Load test:**

- ART clients with undetectable VL: less intensive models – DSD
- ART clients with VL > 1000 copies/mL
  - Follow-up sample
  - Change regimen if persistent

- Close collaboration with clinicians and recipients of care – get out of the lab!
- Use the advantage of available data – quantitative approaches
- Use your monitoring/quantitative results as a basis for your evaluation: Why have the indicators changed?
- Add Qualitative approaches to complement hard data
Finally ... Use Better Evaluation Resources

The Better Evaluation website combines

- systematic evaluation approaches
- Evaluation learning materials
- Practical examples and tools