

# Learning through evaluation how to define and improve organizational strategies

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Evaluation for the private social investment organizational strategy

# Overview

1. What we mean by evaluation?
2. Different types of evaluation at different stages of a program or project
3. Evaluation for defining and improving organizational strategies
4. Learning from evaluation

What do we mean by evaluation?

## **Learning through evaluation how to define and improve organizational strategies**

How do we support learning through evaluation?

Different types of evaluation at different stages

# Evaluation

Combines values and evidence to answer questions like:

- Are we doing the right thing?
- Are we doing things right?

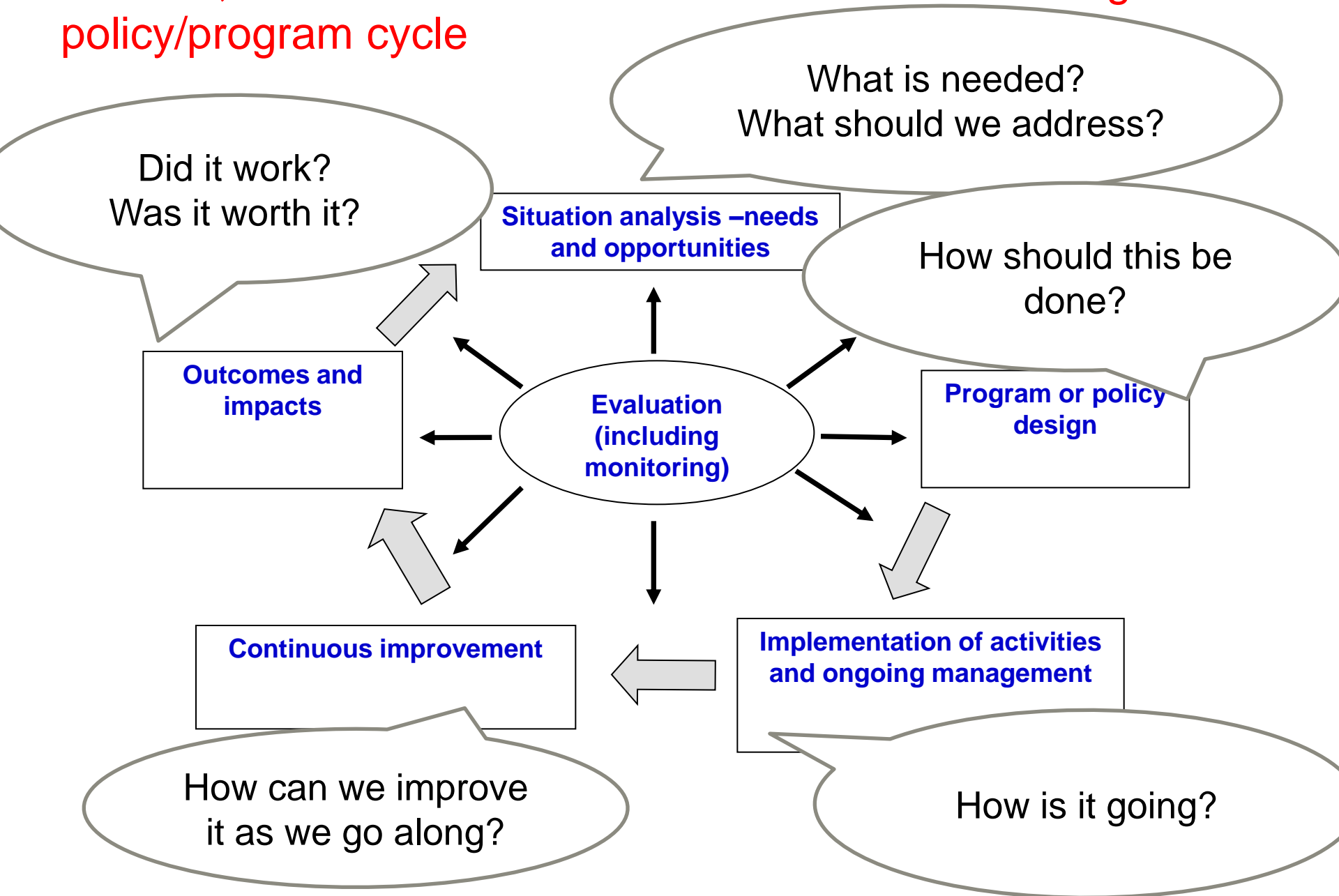
Narrow, less useful view of evaluation – comes at the end, focused on “Did we meet our objectives?”



TRADUÇÃO:  
Rationale=  
Objectives=  
Appraisal=  
Monitoring=  
Evaluation=  
Feedback=  
Implementation=

Mainstreaming Social Inclusion <http://www.europemsi.org/index.php>

# Broader, more useful view of evaluation – done throughout policy/program cycle



Based on Funnell 2006 Designing an evaluation

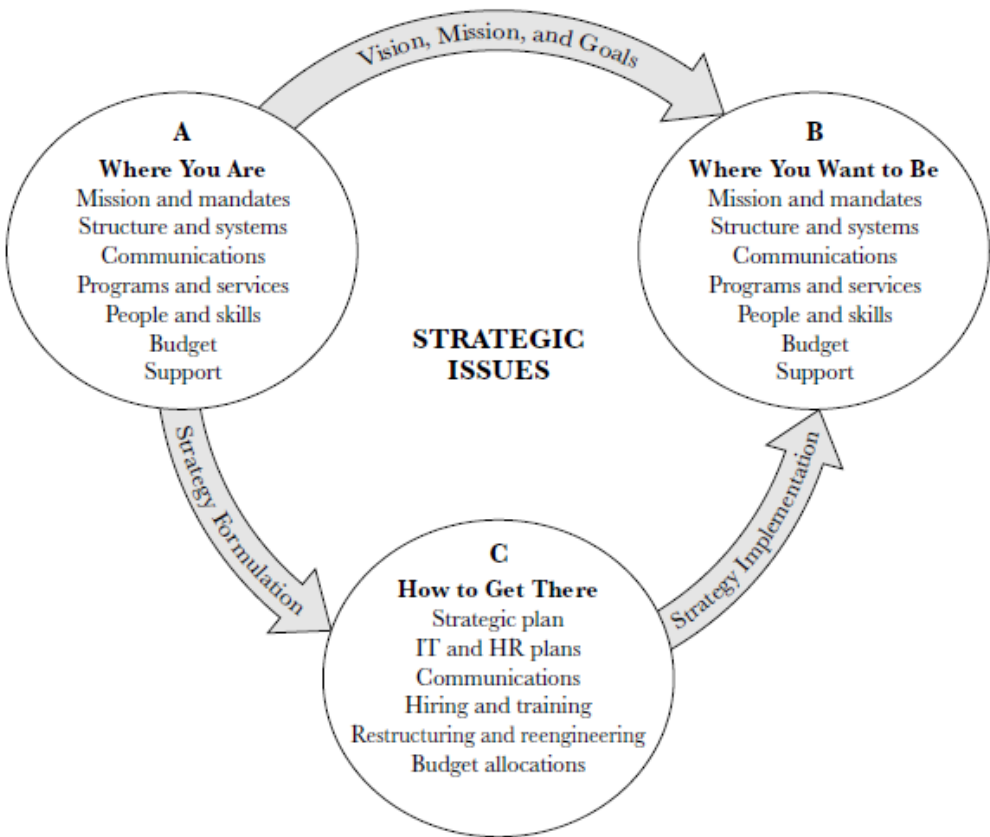
## Types of evaluation – classifying by focus and timing

Needs analysis	What is needed? What are unmet needs?
Intervention design	What is the best way to design the intervention?
Monitoring	How is it going? (regular reporting of metrics)
Process evaluation	How is it going (periodic investigations)? Is it being implemented according to plan? What has been done in an innovative program?
Outcome/Impact evaluation	What changes have occurred? For whom?
Economic evaluation	Has the intervention been cost-effective (compared to alternatives)? What has been the ratio of costs to benefits?

Adapted from Owen (2006), Rossi, Lipsey & Freeman (2003)

# Evaluation for defining organizational strategies

FIGURE 1.1. THE ABCS OF STRATEGIC PLANNING.



TRADUÇÃO:

Source: Bryson and Alston, 2004.



# Evaluation to support learning about where you are

- Situation analysis
- Needs assessment
- SWOT analysis – Strengths, Weaknesses, Opportunities, Threats
- Resource mapping
- Strengths analysis

# Evaluation to support learning about where you want to get to

- Values clarification

# What success looks like in terms of:



Processes



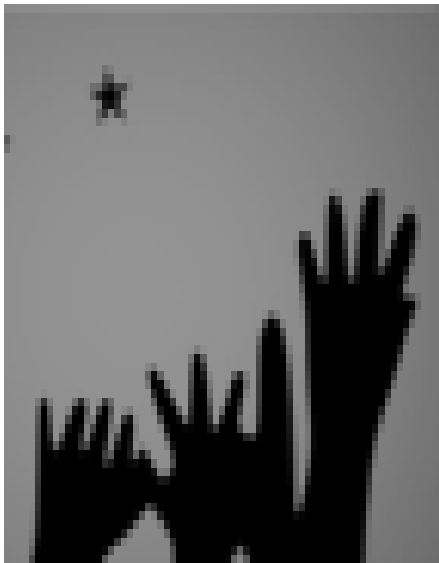
Outcomes and impacts



Distribution of benefits

# Types of values

Formal, explicit  
values



Tacit  
values



Negotiated  
values



# Evaluation to support learning about how to get there

- Theory of change
  - A theory about how change comes about (change mechanism)
  - A theory about what actions can bring about this change mechanism
- Synthesis of what can be learned from others

# Evaluation to support learning about how to improve organizational strategies

## Evaluation of programs and projects

- How is it going?
  - Performance monitoring
  - Quality control – are we doing things the right way?
  - Quality improvement/action research – how can we improve implementation?

# Evaluation to support learning about how to improve organizational strategies

## Evaluation of programs and projects

- Did it work? In what ways, in what situations and for whom did it work? What contributed to making it work?
  - Theory of change informed impact evaluation
    - Methods to answer descriptive questions (what happened?) – measures, indicators, descriptions
    - Methods to answer causal questions (what made this happen?) – experimental, quasi-experimental and non-experimental research designs and strategies)
    - Methods to answer evaluative questions (was this good? Was it worth it?)

# Specify key evaluation questions

Type	Scope	Examples
Descriptive	What has happened? What is the situation?	<p>How was the program implemented?</p> <ul style="list-style-type: none"> <li>• Who attended the program?</li> <li>• Where was it delivered?</li> </ul> <p>What have been the changes?</p> <ul style="list-style-type: none"> <li>• Have objectives been achieved?</li> <li>• What other changes have occurred?</li> </ul>
Causal	What produced the observed changes?	<p>What have been the impacts of the program?</p> <ul style="list-style-type: none"> <li>• Did the program contribute to producing the intended impacts and other results?</li> <li>• What was the contribution of other programs and other factors?</li> </ul>
Evaluative	<p>Is this good?</p> <p>In what ways could it be better?</p> <p>Is it the best option?</p>	<p>Overall was it successful?</p> <ul style="list-style-type: none"> <li>• Did service delivery comply with agreed standards?</li> <li>• Was the program cost-effective?</li> <li>• What were its strengths and weaknesses?</li> <li>• For whom was the program effective?</li> </ul>
Action	What should be done?	<p>Should the program be continued/scaled up?</p> <p>What changes should be made?</p>



# Evaluation to support learning about how to improve organizational strategies

## Evaluation of portfolio of programs and projects

- What is the coverage across areas of importance?
- What is the balance between value and certainty?

	Not profitable	Profitable
Strongly linked to mission		
Weakly linked to mission		

# Types of learning needed

When ...	It is sensible to ...
we know what works & why	ensure processes followed (monitor) demonstrate value of what is being done (advocacy)
we don't know if it works	look at process & outcomes (test theory)
we don't know which is the best way	document process & context & compare performance (outcomes, efficiency)
we don't know what <i>could</i> work	use action research/learning & share results

# Sources of information about evaluation methods and processes



Melhor Eval: *Mundo* Portuguese | ▼

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## BetterEvaluation

Uma colaboração internacional para melhorar a prática da avaliação e da teoria através da partilha de informações sobre as opções (métodos ou ferramentas) e abordagens.

**Clique aqui**  
para saber mais sobre o uso de BetterEvaluation

INTERNATIONAL CONFERENCE ON EVIDENCE-BASED POLICING AND ANZAC CONFERENCE 2014 MAKING IMPACT EVALUATION MATTER INTERNATIONAL ENERGY POLICY PROGRAMME EVALUATION CONFERENCE (IEPPEC) AES2014 INTERNATIONAL EVALUATION CONFERENCE LEON CONGRÈS ANNUEL SEVAL2014 CREA 2014 CENTRE FOR CULTURALLY RESPONSIVE EVALUATION AND ASSESSMENT

Projeto Avaliação e consequências não intencionais ou, de combate a incêndios para a ação

Semana 28: conferências de avaliação

Semana 27: Comemoração contribuições do Canadá para o mundo da avaliação

Semana 26: Pesando os valores das pessoas na avaliação

52 weeks of BetterEvaluation

Encontre opções

O quadro do arco-íris organiza 200 opções + avaliação em sete grupos de tarefas (mostrado à direita, como abas coloridas).

GERIR

DEFINIR

QUADRO

DESCRIVER

ENTENDA AS CAUSAS

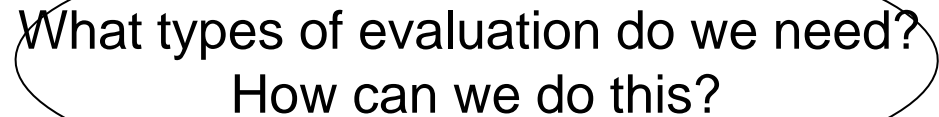
SINTETIZAR

RELATÓRIO E APOIO USO

## Gerenciar um sistema de avaliação ou avaliação

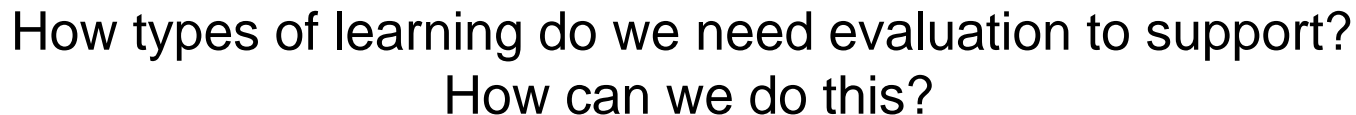
Gerenciar uma avaliação (ou uma série de avaliações), incluindo decidir quem vai realizar a avaliação e quem vai tomar decisões sobre o assunto. [Leia mais](#).

- |   |  |
|---|--|
| 1. Compreender e envolver as partes interessadas      | 6. Processos e acordos de gestão de documentos             |
| 2. Estabelecer processos de tomada de decisão         | 7. Desenvolver documentos de planejamento para a avaliação |
| 3. Decidir quem vai realizar a avaliação              | 8. Avaliação Review (fazer meta-avaliação)                 |
| 4. Determinar e garantir recursos                     | 9. Desenvolver a capacidade de avaliação                   |
| 5. Definir padrões éticos e de avaliação da qualidade |  |



What types of evaluation do we need?  
How can we do this?

## **Learning through evaluation how to define and improve organizational strategies**



How types of learning do we need evaluation to support?  
How can we do this?