

Five ways BetterEvaluation can support you to do better evaluation

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The screenshot shows the BetterEvaluation website homepage. At the top, there's a navigation bar with the logo, 'BetterEvaluation' text, and links for 'Join us', 'Login', and 'Contribute content'. Below this is a search bar and a menu with links like 'Start Here', 'Evaluation Options', 'Approaches', 'Themes', 'Resources', and 'Blog'. The main content area features a 'BetterEvaluation' introduction, a 'Start here' button, and a 'FRAME the boundaries for an evaluation' section with a list of steps: 1. Identify primary intended users, 2. Decide purposes, 3. Specify the key evaluation questions, 4. Determine what 'success' looks like. There are also sections for 'What's new on BetterEvaluation' and 'NEW EVENT' announcements.

Philippines M & E Forum
20 November 2018, Manila

1. Provide step-by-step guidance for planning and managing an evaluation

The screenshot displays the BetterEvaluation website interface. At the top, the logo features a stylized 'b' with a rainbow gradient, followed by the text 'BetterEvaluation' and the tagline 'Sharing information to improve evaluation'. Navigation links include 'Start Here', 'Evaluation Options', 'Approaches', and 'Themes'. A 'Resources' dropdown menu is open, listing items such as 'AEA Coffee Break webinars', 'BetterEval: World', 'Download the Rainbow Framework', 'Equal access participatory M&E toolkit', 'Evaluating C4D Resource Hub', 'Events', 'Forum', 'GeneraTOR', 'Impact Evaluation Series', 'Manager's guide to evaluation', 'New material', 'NSW G Manager's guide to evaluation', and 'Workshops cases'. A blue arrow points to the 'Manager's guide to evaluation' link. The main content area includes a 'BetterEvaluation' section with a description and a 'Start here' button. A sidebar on the left lists evaluation steps: 'Find options', 'MANAGE', 'DEFINE', 'FRAME', 'DESCRIBE', 'UNDERSTAND CAUSES', 'SYNTHESISE', and 'REPORT & SUPPORT USE'. The 'FRAME' step is highlighted, and a box titled 'FRAME the boundaries for an evaluation' provides a list of four steps: 1. Identify primary intended users, 2. Decide purposes, 3. Specify the key evaluation questions, and 4. Determine what 'success' looks like.

BetterEvaluation
Sharing information to improve evaluation

Start Here | Evaluation Options | Approaches | Themes | Resources | Blog

BetterEvaluation
An international collaboration to improve evaluation practice and theory by sharing and generating information about options (methods or processes) and approaches.

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Find options
The Rainbow Framework organizes 300+ evaluation options into 7 clusters of tasks (shown to the right as coloured tabs).

MANAGE
DEFINE
FRAME
DESCRIBE
UNDERSTAND CAUSES
SYNTHESISE
REPORT & SUPPORT USE

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. [Read more.](#)

1. Identify primary intended users
2. Decide purposes
3. Specify the key evaluation questions
4. Determine what 'success' looks like

[Home](#) > [Resources](#) > Manager's guide to evaluation

Manager's guide to evaluation

Also available in: [Français](#)

This is an interactive guide for people who are managing an evaluation.

The guide can be used for managing an evaluation that is conducted by an external evaluator or evaluation team, an internal team, or by a combination of these. It can be used for different types of evaluations and for evaluations of different types of interventions, including projects, programs, policies and clusters of projects. It can also be used for evaluation of research.

The guide aims to support decision making throughout the process of an evaluation, from planning its purpose and scope, designing it, conducting it, reporting findings and supporting use of its findings. In many organizations, this process will draw on the expertise of several individuals. Additional help may need to be obtained for one or more steps in the process.

The information is organized in 9 steps. In some cases, the order in which the steps are addressed in the evaluation process might be slightly different, or earlier steps might need to be revisited in response to changing circumstances and needs.

Navigation

You can navigate through the steps-based information using the 'steps menu' on the right-hand side of every page. You can click on links for further information which are provided within specific pages or you can go back to a previous page using the 'breadcrumbs' at the top of each page.

SEARCH THIS GUIDE:

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

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.

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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

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Identify who will be involved in decisions and what their roles will be

Also available in: [Français](#)

It is important to be clear about who will be involved in the various decisions involved in an evaluation, and what their roles will be.

Who might be involved in making decisions?

Consider the possible involvement of:

- The manager of the intervention
- An evaluation steering committee
- A technical advisory group or some individual technical advisors
- A community consultation committee or key informants from the community

What will be their role in decision making?

The role of each individual or group in relation to specific decisions can be specified as follows:

- *Consulted* - Those whose opinions are sought; they are engaged in two-way communication.
- *Recommends* - Those who are responsible for putting forward a suitable answer to the decision.
- *Approves* - Those who are authorised to approve an answer to the decision.
- *Informed* - Those who are informed after the decision has been made; they are engaged in one-way communication.

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](#)
- [Decide whether the evaluation will be done by an external team, an internal team or a hybrid of both](#)
- [Determine the evaluator qualities](#)
- [Identify what resources are available for the evaluation and what will be needed](#)

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Step 3 Develop the Terms of Reference (ToR)

Develop the formal document that outlines the requirements for the evaluation.

FEEL FREE TO USE A UNIQUE, FREE SOFTWARE to write your ToR:

You can use a template in a wordprocessing software to write the ToR for your evaluation or you can use the **GeneraTOR** below which will guide you through writing the different sections of a ToR / RFP. It will generate a word document with your saved information which can then be further refined and/or reviewed by others.

Here is a snapshot of the software:

GeneraTOR

Terms of Reference generator

Project number

Background Information ✓

Scope of the evaluation

Purpose / objectives / rationale ✓

Intended user(s) and use(s) ✓

Evaluation questions ✓

The principles and approach that will guide the evaluation

Methodology

Roles and responsibilities

Evaluator qualifications

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

Step 4 Engage the evaluation team

Evaluations can be conducted by in-house staff (internal) or a third party (external) or a mix of both. Advertising the Terms of Reference (ToR) / Request for Proposal (RFP) is the first step in engaging external evaluators but other important issues need to be addressed to ensure an effective and transparent selection process and to orient the selected evaluator(s).

[Read More](#)

Sub-steps:

- [Advertise the evaluation Terms of Reference \(ToR\) / Request for Proposal \(RFP\)](#)
- [Select an evaluator / evaluation team](#)
- [Prepare the contract](#)
- [Orient the evaluator / evaluation team](#)

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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.

[Read More](#)

Sub-steps:

- [Consider important elements of what is being evaluated](#)
- [Consider important aspects of the evaluation](#)
- [Consider the implications of the resources available and specific constraints](#)

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Step 6

Manage development of the evaluation work plan including logistics

Oversee or engage in the development of a work plan that sets out the specific activities to implement the evaluation. This should include identification of the reporting requirements and a dissemination plan.

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Step 7 **Manage implementation of the evaluation**

Oversee or engage in specific evaluation activities to collect and analyse data as set out in the evaluation work plan (including revising it as needed) and keeping the evaluation management group(s) informed and involved.

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Step 8 Guide production of quality report(s)

The evaluation reports should include relevant and comprehensive information structured in a manner that facilitates its use but also provide transparency in terms of the methods used and the evidence obtained to substantiate the conclusions and recommendations.

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Step 9 Disseminate reports and support use of evaluation

Make evaluation reports available and engage with primary intended users to make the results accessible. Archive the evaluation report and data (if appropriate). Use effective strategies to support use of the findings.


[Read More](#)


Sub-steps:

- [Make evaluation reports available and engage with primary intended users to make the results accessible](#)
- [Archive the evaluation report and data \(if appropriate\)](#)
- [Support the use of evaluation findings](#)

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2. Provide information on specific methods and processes you know by name

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Randomized Controlled Trial (RCT)

Synonyms: RCT, Clinical Trial, Randomized Controlled Trial, Randomized Impact Evaluations

Approach - [Angela Ambroz](#), [Marc Shotland](#)




Randomised controlled trials (RCTs), or randomised impact evaluations, are a type of impact evaluation which uses randomised access to social programmes as a means of limiting bias and generating an internally valid impact estimate.

[Read More](#)

From rigorous methods to rigorous processes – directions for travel after the RCT debate

Blog - [Tiina Pasanen](#) - 25th February, 2013

It is neither relevant nor useful to either only criticise randomised control trials (RCT) or treat them as the only choice for rigorous impact evaluation (IE). We need to look for other approaches and methods that can contribute to causal inference and systematically link observed effects to causes as well as extend what we mean by rigorous IE.



RCT

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☐ [Randomized experiment \(1\)](#)

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Randomised Controlled Trial

Synonyms: RCT, Clinical Trial, Randomized Controlled Trial, Randomized Impact Evaluations

Randomised controlled trials (RCTs), or randomised impact evaluations, are a type of impact evaluation which uses randomised access to social programmes as a means of limiting bias and generating an internally valid impact estimate.



Contents

- [1 Introduction](#)
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- [3 Steps of an RCT](#)
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- [5 Mapping the approach in terms of tasks and options](#)
- [6 Advice on choosing this approach](#)
- [7 Advice when using this approach](#)
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- [9 FAQ \(Frequently Asked Questions\)](#)
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An RCT randomizes who receives a program (or service, or pill) – the treatment group - and who does not – the control. It then compares outcomes between those two groups; this comparison gives us the impact of the program. RCTs do not necessarily require a “no treatment” control – randomization can just as easily be used to compare different versions of the same program, or different programs trying to tackle the same problem.

In this way, the control mimics the counterfactual. The counterfactual is defined as what would have happened to the same individuals at the same time had the program not been implemented. It is, by definition, impossible to observe – it’s an

Share



Rainbow Framework

[Rainbow Framework overview and downloads](#)



Manage



Define



Frame



Describe



Understand Causes



Synthesise



Report & Support Use

Resources




[6: Sample Size and Power Calculations](#)



[Contemporary Thinking About Causation in Evaluation](#)

3. Provide options for particular tasks

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Find options


The [Rainbow Framework](#) organizes 300+ evaluation options into 7 clusters of tasks (shown to the right as coloured tabs).


 **MANAGE**


 **DEFINE**

 **FRAME**

 **DESCRIBE**

 **UNDERSTAND CAUSES**

 **SYNTHESISE**

 **REPORT & SUPPORT USE**

DESCRIBE activities, outcomes, impacts and context

Collect and retrieve data to answer descriptive questions about the activities of the project/program/ policy, the various results it has had, and the context in which it has been implemented. [Read more.](#)

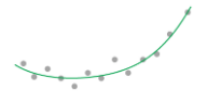
1. Sample
2. Use measures, indicators or metrics
3. Collect and/or retrieve data
4. Manage data

5. Combining qualitative and quantitative data
6. Analyse data
7. Visualise data

13

Options

See relationship



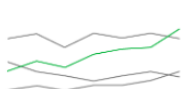
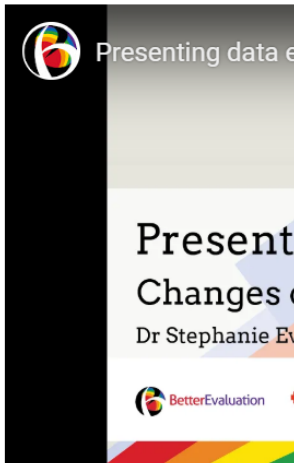
observations from



Compare a set of



Changes over time



Bubble
Providing
and ea

Bullet
Using a
perform

Deviation
Aligning
their data

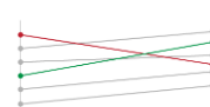
Dot plot
Plotting
comparison

Small pie
Positioning
easy to

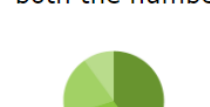
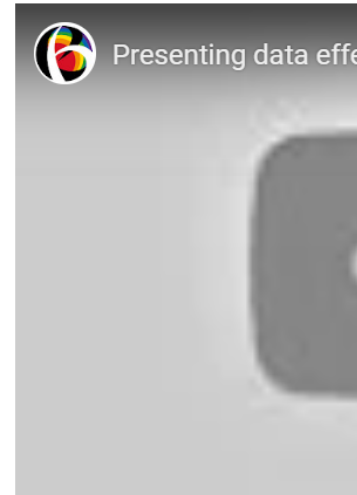
Changes over time



Line Graph
Displaying
straight



See the parts of a whole



Slopegraph
Comparing

Split Axis
Regraphing

Stacked Bar
Visualising
are "stacked"

See the parts of a whole



Icon array
Arranging
as a frequency

Pie Chart
Illustrating
(like slice)



Analyse a text



See the world



Treemap

Making use of qualitative information in the form of important distinctions or differences that people see in the world around them. They help overcome some of the problems that may be encountered when dealing with qualitative information.

Phrase Net

Connecting key words in a text using lines to show linkages.

Word Cloud

Displaying the words in a qualitative dataset, organised by frequency of use.

Word Tree

Displaying of the words in qualitative dataset, where frequently used words are connected by branches to the other words that appear nearby in the data.

Demographic Mapping

Using GIS (global information system) mapping technology to show data on population characteristics by region or geographic area.

Geotagging

Adding geographic information about digital content, within "metadata" tags - including latitude and longitude coordinates, place names and/or other positional data.

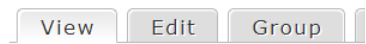
GIS Mapping

Creating very precise maps representing geographic coordinates that could include information relating to changes in geographical, social or agricultural indicators.

Interactive mapping

Using maps that allow zooming in and out, panning around,

Bubble Chart



Synonyms: Motion chart

Commonly used on maps, a axis plots, or no plot at all, charts communicate the raw count, frequency, or proportion of some variable where the size of the bubble reflects the quantity. Color-coding bubbles can represent a further category of the variable being graphed showing the movement of bubbles.

The difficulty with bubble graphs is quick comparison of values and precise determination. Some further complicating comparison of bubbles if the range is too large can become a challenge to interpret.

[This blog post on the Scientist](#) discusses the difficulty and sometimes inaccuracy of bubble charts.

Example

There are many more examples of bubble charts looking at examples. The twitter chart can be used.

Frequency of words at national level

Advice

Advice for CHOOSING this option (tips and traps)

This option is particularly useful for conveying a large amount of numeric information quickly. Ensure that your audience is visually literate.

Make sure you have at least three sets of linked variables that you want to investigate.

Ensure the data collectors are all collecting data in prescribed formats and in software that allows for upload to common bubble chart creation sites.

Make sure it is clear what each element of the chart means – color, circumference, how it fits on the scale, etc. otherwise meaning can be lost.

Advice for USING this option (tips and traps)

Know the capabilities of the software available. Features can vary between software packages.

Collect data in prescribed formats and in software that allows for upload to bubble chart creation sites.

This tool is useful for showing situations but not for answering 'how?'. This option will need to be supplemented with investigating the reasons behind problems or trends.

Position the center of the bubble over the category or variable associated with, if applicable.

This option requires some understanding of statistics to draw bubble charts manually. For example, the area of a circle in bubble charts is proportional to the square of the radius. To get a properly weighted scale, take the square root of the third metric rather than the metric itself. Alternatively there are software programs, including Excel 2013, that will draw them for you automatically.

Resources


Guides



[How to Make Bubble Charts](#): This tutorial from Flowing Data, provides a detailed guide on creating bubble charts using the software provided.

Tools

[Gapminder](#): This website allows you to enter data or use the data sets that are available on site on create bubble charts.

4. Find out about new things

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MANAGE

DEFINE

FRAME

DESCRIBE

UNDERSTAND CAUSES

SYNTHESISE

REPORT & SUPPORT USE

Find options

The Rainbow Framework organizes 300+ evaluation options into 7 clusters of tasks (shown to the right as coloured tabs).

DEFINE what is to be evaluated

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

1. Develop initial description
2. Develop program theory/theory of change
3. Identify potential unintended results

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NEW EVENT:

[Social Science Research Methodologies Workshop: Tackling Antimicrobial Resistance](#)

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[The visual representation of complexity: Definitions, examples and learning points](#)

NEW MATERIAL






From paper to practice: Supporting the uptake of high-level M&E frameworks



FROM PAPER TO PRACTICE:
SUPPORTING UPTAKE OF M&E FRAMEWORKS

Monitoring and evaluation frameworks provide a common reference point for evaluations of different projects that form a program, or different types of evaluations of a single program. However getting agreement on a document is only the start of achieving the intended benefits of evaluation frameworks. In this guest blog, George Argyrous from ANZSOG outlines 9 actions that can be taken to support the implementation of high-level monitoring and evaluation frameworks, and make sure these frameworks don't languish on a dusty shelf. [Read more.](#)

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New resource: IIED Brief - Embedding evaluation in national plans and policies to foster transformative development

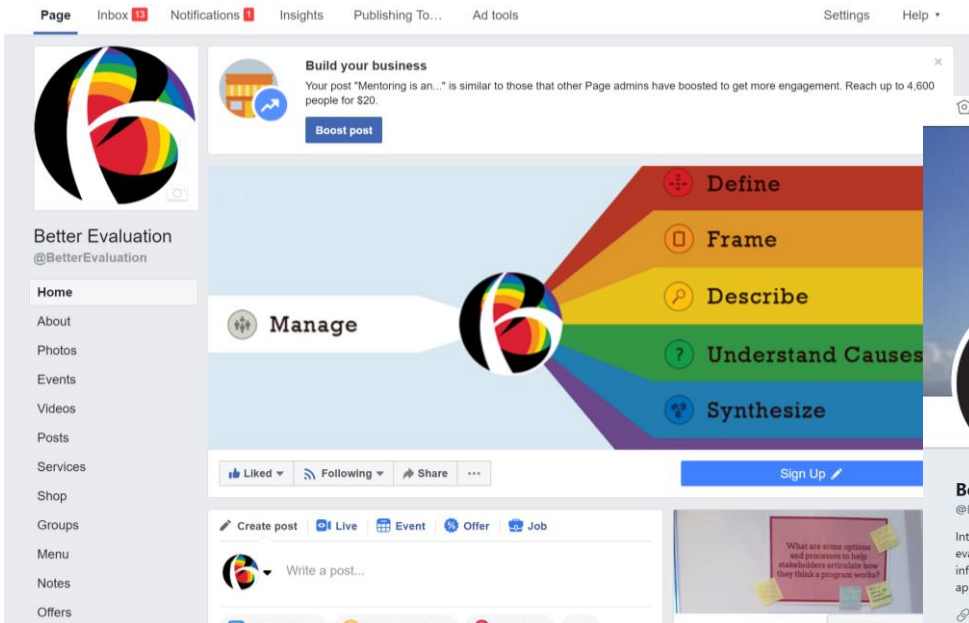
This IIED Briefing Paper argues that meaningful evaluation of progress towards achieving sustainable development extends beyond supporting voluntary national reviews, and that for the full potential of evaluation to be realised, evaluation processes must be embedded in national policies and strategies.

[Read more.](#)

New resource: DHHS Stakeholder engagement toolkit

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Build your business
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Manage

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- Frame
- Describe
- Understand Causes
- Synthesize

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Important #costbenefitanalysis of #dataviz . #evaluation


Stephanie Evergreen @evergreendata
A12. When 12 senior vps spend the hour-long meeting (at \$200/hr) trying to figure out what the graph is saying, that's a wasted \$1200, not to mention the

Your Tweet activity
Your Tweets earned 3,572 impressions over the last week


Who to follow · Refresh · View all

<https://twitter.com/BetterEval>

5. Share your insights and experiences

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