QUADRANT
CONSEIL

STRATÉVAL

A game to collectively build your evaluation strategy

CREDITS

This game was designed by Thomas Delahais for Quadrant Conseil, with help from Hélène Faure, Noémie Lequet and Cherifa Oudghiri.

Our thanks go to all the early testers for their feedback and help in improving the game.

All pictograms are issued from the Flaticon database. Graphic designers are paid for use.

www.quadrant-conseil.fr/strateval

Why this card game?

The methodological approach to evaluation is too often taken through the narrow lens of the tools or data already available... for beginners, methodology is a "mystery box" that is left to the specialists, for fear of making mistakes. However, methodology is not only a technical issue, it is often very political!

The goal of STRATEVAL is to provide you with a playful tool for reflection on your practices, which also gives you the opportunity to expand your knowledge of the different approaches and methods of evaluation. You will start with the expected uses of evaluation and its questions to propose an overall strategy, which you will then implement using specific tools and techniques.

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Basic rules

Players : 1 to 4 – Time : 1h to 2h

1 - Identify an evaluation of your choice. It can be a new or existing evaluation

2 - Choose the criteria to which the evaluation will answer

3 - Identify your overall approach by combining several Strategy cards. Read aloud the back of each card before selecting it.

4 - Choose your Tools and Deliverable cards and make sure they match the Strategy Cards. A tool can match several strategy cards, and vice versa.

5 - Organise your evaluation as a time process with the deliverables as milestones.

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The Cards

Criterion cards : Identify one or several criteria to which the evaluation will answer. It's easier to start with one major criterion and formulate a specific question to develop a strategy.

Strategy cards : Detail the aim, focus, positioning, relation to objectives, analytical process and empirical approach of the evaluation. All 6 are interrelated.

Tool cards : Select tools for structuring the evaluation, collecting data, analysing it and making a judgement. Identify relationships. Arrange them chronologically.

Deliverable tools : Position your deliverables in the evaluation process. Verify which tools will contribute to which deliverables.

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Game scenarios

Collective use for training

Choose an evaluation strategy from a case study of evaluation. Read each card to learn about some key aspects of any evaluation strategy. This way, each player discovers what are the different ingrediens and the choices that have to be made. Once the reading is done, players discuss and make a choice.

Professional use (workshop)

Use STRATEVAL to prepare Terms of Reference, design an evaluation process, or reflect on past evaluations. Identify which aspects of the evaluation remained implicit and find solutions to make them explicit.

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Professional use (tutorship)

Seasoned evaluators can use STRATEVAL to explain and justify evaluative choices to colleagues. Young evaluators can also use the game to argue in support of alternative designs and choices.

Individual professional use

Use STRATEVAL to design alternative evaluation strategy for an upcoming assignment. Use it to expand your repertoire of evaluation designs and avoid routine.

Use of individual cards

Use the Strategy or Tool cards separately when you need them, e.g. To verify which tools will be needed to collect information along the Theory of Change.

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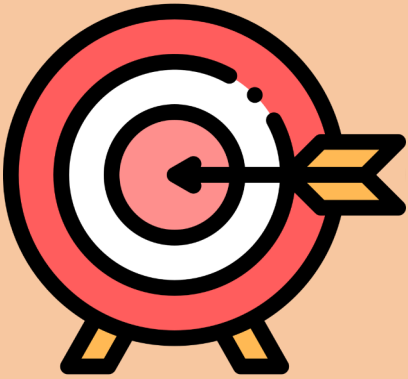
CRITERION CARD

EFFECTIVENESS



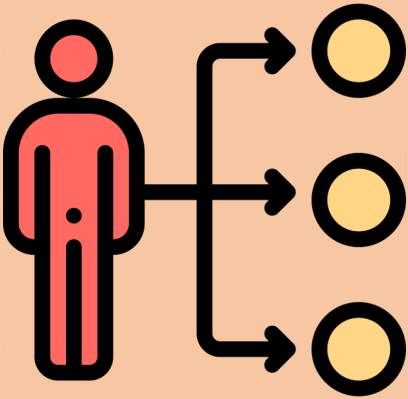
EFFECTIVENESS

This criterion is about assessing if, how and why the intervention has had the expected effects on the different targets of the intervention.

Effectiveness questions can be answered with impact evaluation approaches when it is important to assess causal links rigourously. A key challenge in all cases is to specify what are the expected effects, for example through a theory of change.

CRITERION CARD

EFFICIENCY



EFFICIENCY

This criterion is about assessing whether the effects were obtained at a reasonable cost, for example in comparison with other types of intervention.

A distinction is made between allocation efficiency (optimal use of resources) and production efficiency (cost in relation to the effects on the targets of the intervention).

CRITERION CARD

RELEVANCE

RELEVANCE

This criterion is about understanding if and how the strategy engaged in the intervention being evaluated is addressing the problems it seeks to solve or mitigate, with the right scope.

The key issue of relevance is problem definition. Problems are complex, they are often framed and presented in certain ways which are not explicit. Problems also change over time - it is useful to understand these changes to check whether the action is still relevant or not.

CRITERION CARD

UTILITY

UTILITY

This criterion is about judging the intervention, not only in terms of its intended effects, but also in terms of all its consequences, desirable or undesirable, including on higher-level outcomes or impacts.

Utility is useful to evaluate complex, long-term interventions because it enables the evaluation to make more balanced judgments, in terms for instance of contribution to the general interest or the common good.

CRITERION CARD

INTERNAL COHERENCE

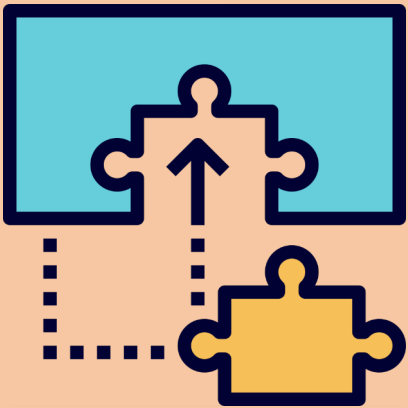
INTERNAL COHERENCE

This criterion is about checking whether the different strategic and operational objectives of an action are all headed towards the same expected outcomes.

When testing this criterion, a challenge is to verify this in theory, but also in the way the intervention was implemented.

CRITERION CARD

EXTERNAL COHERENCE



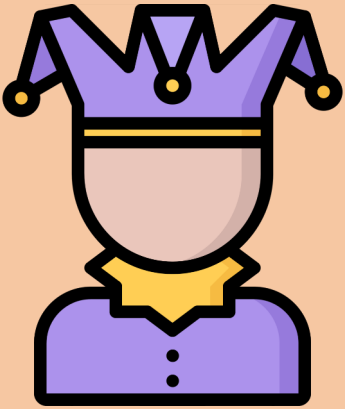
EXTERNAL COHERENCE

The aim is to ensure that the various stakeholders involved in the sector to which the evaluated intervention belongs are pursuing similar or complementary objectives, towards a similar direction.

When testing this criterion, a challenge is to verify this in theory, but also in the way the intervention was implemented.

CRITERION CARD

JOKER

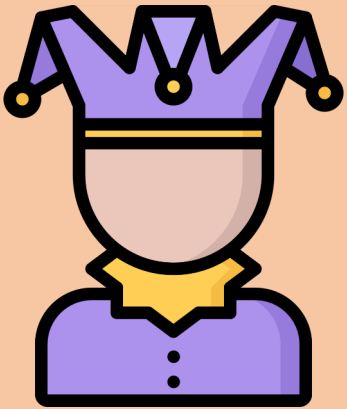


JOKER

Equity, sustainability, added value… you choose

CRITERION CARD

JOKER



JOKER

Equity, sustainability, added value… you choose

STRATEGY CARD

Aim

AMBITION FOR PRACTICAL IMPROVEMENT

AMBITION FOR PRACTICAL IMPROVEMENT

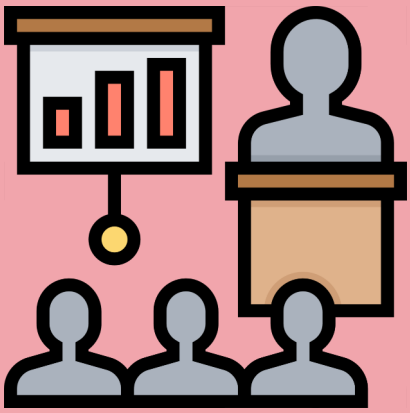
Evaluation is primarily aimed at improving the existing intervention. It focuses in particular on clarifying the issues at stake, objectives, aspects relating to implementation, etc.

Contrary to the transformative ambition, it does not question the intervention's rationale (what are the fundamental issues of the issue at stake, are they being addressed?) or its overall utility for society.

STRATEGY CARD

Aim

LEARNING AMBITION



LEARNING AMBITION

Evaluation is primarily aimed at learning from the intervention being evaluated. This may include lessons learned from the analysis of the intervention that can be applied to other cases; but also more generally, concepts, ways of seeing, unexpected but desirable effects (which will be actively sought after) or undesirable effects (which will be actively confronted).

In contrast to the accountability ambition, it does not necessarily seek to establish whether objectives were attained.

STRATEGY CARD

Aim

TRANSFORMATIVE AMBITION

TRANSFORMATIVE AMBITION

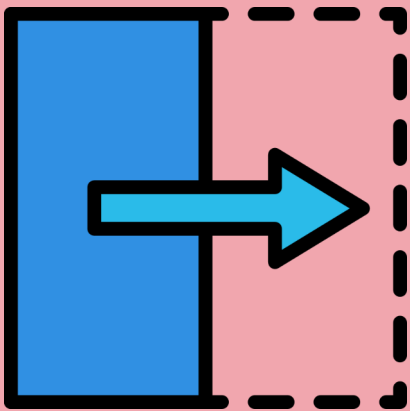
Evaluation aims at changing or redesigning the whole intervention, in terms of the overall vision of the issues at stake, the impact mechanisms, etc. It seeks to provide a different perspective on things, through an approach close to redesign, and to do so relies on participation or expertise.

Contrary to the ambition for practical improvement, it focuses little on the operational dimensions of implementing the intervention.

STRATEGY CARD

Aim

ACCOUNTABILITY AMBITION



ACCOUNTABILITY AMBITION

The evaluation aims primarily at telling whether the objectives have been attained. It does not expect to transform the intervention and if practical improvements are suggested, it is in support of the objectives initially set.

Intervention funders, who are not directly involved in implementation or result delivery, may typically carry this ambition.

Unlike the learning ambition, it does not necessarily seek to draw lessons from the evaluation.

STRATEGY CARD

Focus

FOCUS ON SUCCESSES

FOCUS ON SUCCESSES

A focus on successes is of interest when one seeks to identify a new intervention model, ingredients for success or to replicate conditions for success. The evaluation then focuses on the beneficiaries of the intervention or its desirable effects, intended or not.

A focus on successes can also be used to investigate implementation issues or discrepancies in results. As the intervention is labelled a success, actors are more likely to discuss the problems they have encountered.

STRATEGY CARD

Focus

FOCUS ON FAILURES

FOCUS ON FAILURES

A focus on failures is appropriate when the intervention does not seem to be working or when success appears heavily context dependent, but for reasons which are unclear. Evaluation focuses on projects or people that have been rejected from the intervention, have left it midway, or for whom changes do not match expectations. They look for explanations relating to intrinsic merits or conditions of implementation of the intervention.

STRATEGY CARD

Focus

FOCUS ON UNANTICIPATED CONSEQUENCES

FOCUS ON UNANTICIPATED CONSEQUENCES

A focus on the unintended consequences of the intervention is used to go beyond the objectives or intended or desirable effects, which are often the main focus of evaluation.

This approach can be exploratory (are there any unintended consequences?) and/or confirmatory, typically in the form of an in-depth analysis of one or more known consequences.

STRATEGY CARD

Focus

FOCUS ON LACK OF UPTAKE

FOCUS ON LACK OF UPTAKE

A focus on those who do not benefit from an intervention, though they could. It shifts the perspective from the usual focus on beneficiaries.

The evaluation specifically seeks to know who do not benefit from the intervention, how many are they, why, what the consequences are, etc.

STRATEGY CARD

Focus

FOCUS ON IMPLEMENTATION

FOCUS ON IMPLEMENTATION

A focus on implementation at different stages: actual programming and progress of actions; or the way in which stakeholders take up the intervention: how are they informed, are they willing and capable of getting involved, etc.

Such an evaluation can be a prerequisite for an evaluation focusing on impacts, considering that good implementation is a necessary condition for impact.

STRATEGY CARD

Focus

IMPACT OF THE INTERVENTION

IMPACT OF THE INTERVENTION

An impact evaluation aims at establishing a cause-and-effect relationship between an intervention and one or more expected changes, in particular changes that are important for qualifying a programme as a success or failure (e.g. does a back-to-work programme get people out of unemployment?)

An impact evaluation relies on a specific methodological framework, and in particular a given view of causality and one or several approaches known for enabling the identification of cause and effect relationships.

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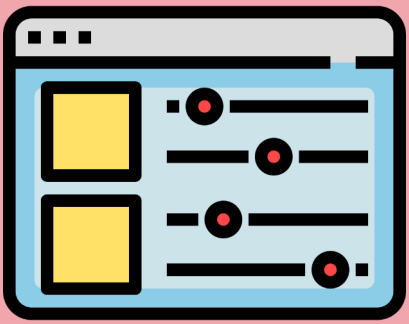
STRATEGY CARD

Position

EMBEDDED EVALUATION



EMBEDDED EVALUATION

Evaluation is at the service of the intervention's success. The evaluator is closely associated to the intervention team (or a member).

They identify issues of relevance, coherence or effectiveness, collect data to qualify them, provide evaluative analyses and corrective measures.

As they are involved in all decisions, they are not in a position to "judge" the programme but need to keep distance, as a "critical friend".

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STRATEGY CARD

Position

COLLABORATIVE EVALUATION

COLLABORATIVE EVALUATION

The intervention is recognised as a complex object that is perceived or lived differently by the stakeholders. Understanding the intervention, it is necessary to identify these perspectives and to integrate them into the evaluation.

In collaborative evaluation, stakeholders participate at different stages, but they do not have the power over the process. It fits better a practical than a transformative ambition (e.g. more about changing intervention details rather than rethinking the rationale…).

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STRATEGY CARD

Position

PARTICIPATORY EVALUATION

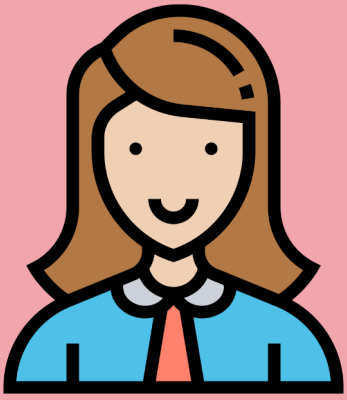
PARTICIPATORY EVALUATION

Evaluation is designed as a collective problem-solving process involving all concerned parties. Stakeholders have some power over the process. They may formulate the evaluation questions, have their say on evaluation design as well as on conclusions and recommendations. This evaluation may challenge the overall vision of the issues and in this case initiate a more significant transformation.

STRATEGY CARD

Position

MANAGERIAL EVALUATION / PERFORMANCE



MANAGERIAL EVALUATION/ PERFORMANCE

Evaluation is primarily designed to serve the decision-makers' needs. It seeks to provide factual information on the attainment of objectives or the position of an intervention in a given strategy. Its recommendations essentially point at practical aspects: whether or not to the intervention should be continued, and what practical details should be modified.

STRATEGY CARD

Position

INDEPENDENT EVALUATION

INDEPENDENT EVALUATION

In an independent evaluation, the evaluator is free to define their own questions and answers, as long as they can demonstrate the robustness of their approach and the credibility of their findings.

What makes an independent evaluator credible may be their own professional background, their administrative position, the methods they use, etc.

STRATEGY CARD

Position

EMPOWERING EVALUATION

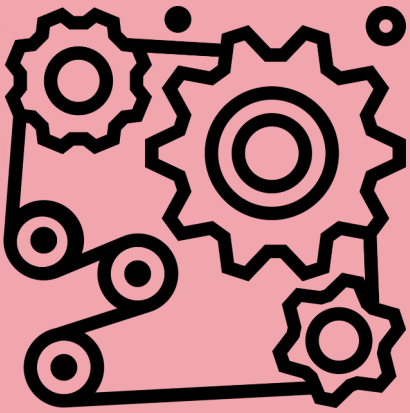
EMPOWERING EVALUATION

Empowering evaluation aims to give power to the most disadvantaged, vulnerable or marginalised people, and/or to those who implement interventions on the field, through a process of evaluation ownership by these people, who use it in support of transformation.

STRATEGY CARD

Reference to objectives

THEORY-BASED APPROACH



THEORY-BASED APPROACH

Theory-based evaluation establishes sequential causal linkage between outputs and intended effects. The latter may differ from the original objectives, be based on research or stakeholder narratives. These hypotheses are systematically tested, with a view to explain why the expected effects were obtained or not. New assumptions to be tested can be established during the evaluation (e.g. alternative pathways).

This card is opposed to a goal-free approach and to an objective-oriented approach.

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STRATEGY CARD

Reference to objectives

GOAL-FREE EVALUATION

GOAL-FREE EVALUATION

Goal-free evaluation openly looks for possible desirable or undesirable consequences and tests them. It is useful when objectives are lacking, too poorly formulated, or do not cover the range of consequences that matter (including particular questionings such as gender equity, resilience, etc.)

This card is opposed to an objective-oriented approach and to a theory-based approach.

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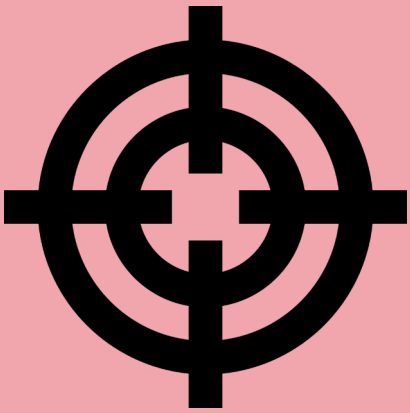
STRATEGY CARD

Reference to objectives

THE GOAL-ORIENTED APPROACH



THE GOAL-ORIENTED APPROACH

Here, evaluation focuses on the comparison between the objectives initially set and the performance observed. If the objectives are not achieved, the evaluation focuses on why, by re-interrogating either the way the objectives were set or the intervention, with a primary interest for accountability.

This card is opposed to a goal-free approach and to a theory-based approach.

STRATEGY CARD

Analysis

ATTRIBUTION ANALYSIS

ATTRIBUTION ANALYSIS

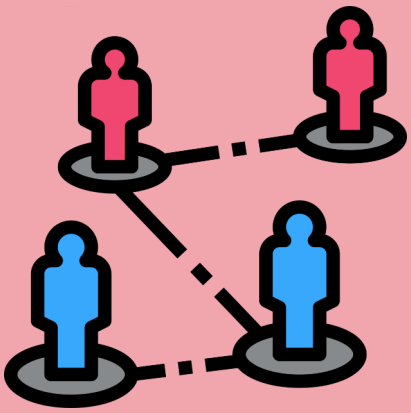
This approach seeks at telling whether an observed change can be attributed to an intervention, much like when a medical treatment is tested. It can be used for simple causal chains, in particular in an accountability perspective. The focus is on the intervention only, not on implementation or context.

This card opposes Contribution, which look at interventions as complex objects.

STRATEGY CARD

Analysis

LONGITUDINAL ANALYSIS (BEFORE AND AFTER)



LONGITUDINAL ANALYSIS (BEFORE AND AFTER)

This approach is based on the study of a population over time. An indicator is measured before and after the introduction of an intervention and provides a measure of change. Breaks in the trends observed can be used, under certain circumstances, to infer causality.

STRATEGY CARD

Analysis

CONFIGURATIONAL ANALYSIS

CONFIGURATIONAL ANALYSIS

This approach aims to identify the conditions that may be associated with an expected change. These conditions may be necessary or sufficient. Together they may form packages associated with success or failure. This approach requires the ability to measure changes and a good knowledge of the associated conditions (through literature review, expertise, or an exploratory phase).

This card is opposed to Attribution analysis, but can be combined with Contribution analysis.

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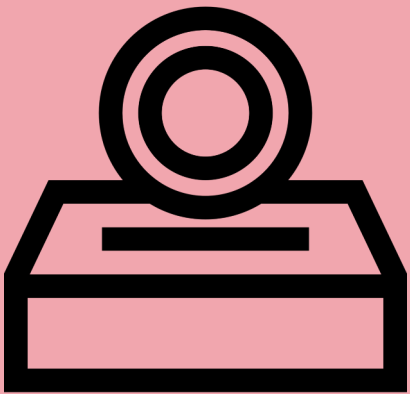
STRATEGY CARD

Analysis

CONTRIBUTION ANALYSIS



CONTRIBUTION ANALYSIS

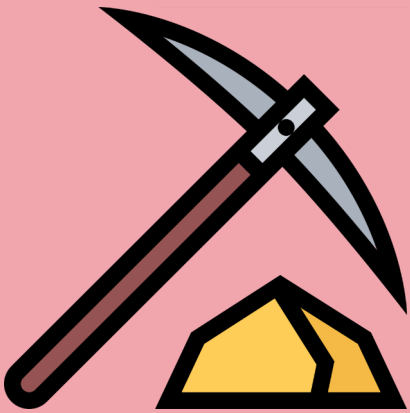
In this approach, the intervention is recognised as one process among others that can explain the results. Evaluation seeks to "reinforce the degree of confidence" in a contribution.

The analysis will distinguish between measuring changes, looking for evidence to confirm or disconfirm the contribution of the intervention, and looking for other key factors that may explain the changes.

STRATEGY CARD

Analysis

SINGLE-CASE INVESTIGATION



SINGLE-CASE INVESTIGATION

The intervention takes the form of a single case. Evaluation investigates that case in depth, its context, its specificities. It helps understanding how the intervention works or does not work in a specific situation. It can be used to decide whether or not to maintain an intervention, or to begin replicating it in other contexts.

This card is generally opposed to Comparison between cases, or can be considerd as a second step.

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STRATEGY CARD

Analysis

COMPARISON BETWEEN CASES

COMPARISON BETWEEN CASES

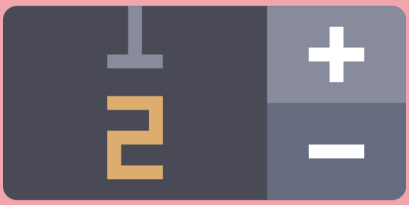
The intervention includes many cases (projects, or more broadly intervention units) all set up in different contexts. It is then a matter of using these differences to understand what works and what does not, in which cases, and why. This can then be used in a scaling-up process.

This card is usually opposed to Single-case investigation, or is considered as a first step before it.

STRATEGY CARD

Empirical approach

QUANTITATIVE APPROACH



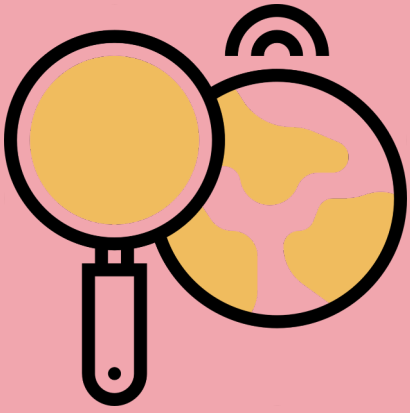
QUANTITATIVE APPROACH

The approach consists in quantifying changes or effects expected from the intervention. The aim is to assess an effect's magnitude, or the proportion of a change that can be attributed to the intervetion, or identifying the factors that are linked to an effect. Only possible if quantitative data related to the effects of the intervention is available or can be easily retrieved.

STRATEGY CARD

Empirical approach

QUALITATIVE APPROACH



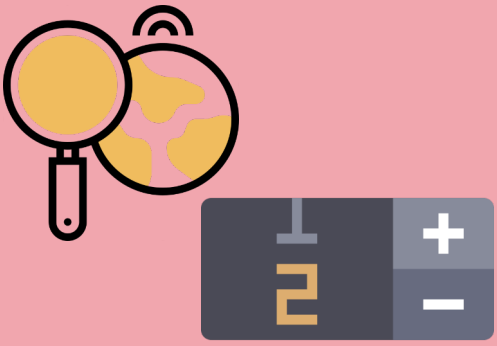
QUALITATIVE APPROACH

The approach consists in contextualising the observed situations and exploring, at varying degrees of depth, explanations for the observed phenomena. Only if field investigations are possible.

STRATEGY CARD

Empirical approach

MIXED METHODS



MIXED METHODS

Data collection methods, whether quantitative or qualitative, are articulated in such a way as to respond to each other, in response to the evaluative questions, and depending on what data is actually available and the possibilities for field investigation.

STRATEGY CARD

Empirical approach

CONFIRMATORY APPROACH

CONFIRMATORY APPROACH

The intervention is well known and has been evaluated several times. Assumptions are explicited and then systematically tested to assess the intervention.

An approach that is initially exploratory can identify the hypotheses that will then be tested with a view of generalising the results.

STRATEGY CARD

Empirical approach

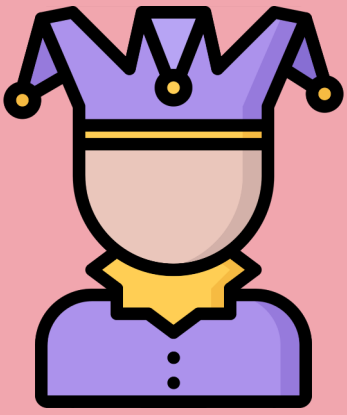
EXPLORATORY APPROACH

EXPLORATORY APPROACH

The intervention and/or its effects are poorly known, so there is an initial need to take ownership of the subject and understand it well enough to be able to ask the right questions. The assumptions formulated at this stage are very flexible and may be more systematically tested later. An evaluability analysis (how can this intervention be evaluated?) can be part of this framework.

STRATEGY CARD

JOKER

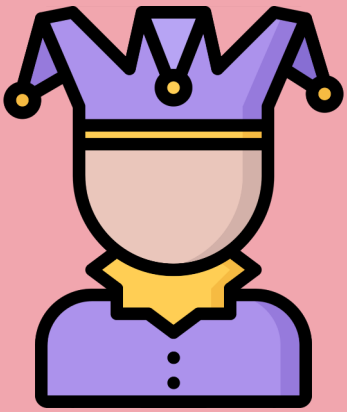


JOKER

Aim, position, focus, reference to objectives, analysis, empirical approach… What would you like to detail?

STRATEGY CARD

JOKER



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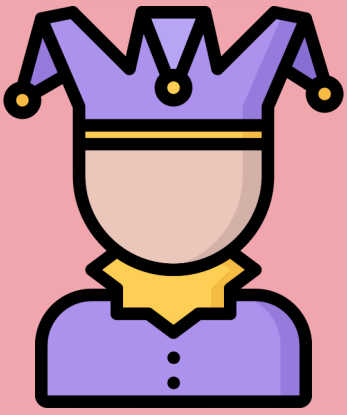

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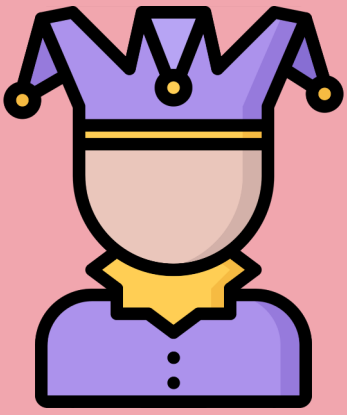


JOKER

Aim, position, focus, reference to objectives, analysis, empirical approach… What would you like to detail?

TOOL CARD

Structuring Judging

Collecting Analysing

STAKEHOLDER MAPPING

STAKEHOLDER MAPPING

This tool helps identify all the stakeholders in an intervention: decision-makers, operators, end beneficiaries, winners and losers, etc.

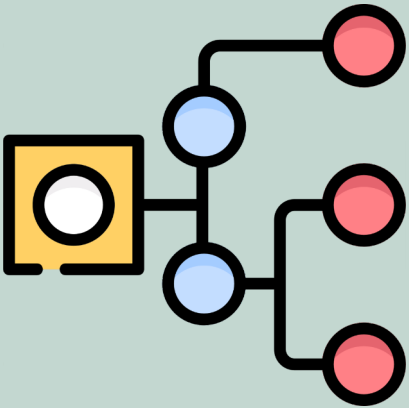
It is a useful preliminary tool, particularly for complex interventions. It is then used to develop a problem tree or a logical model, to specify the data collection to be carried out, to build a steering committee, etc.

TOOL CARD

Structuring Judging

Collecting Analysing

LOGICAL MODEL



LOGICAL MODEL

This tools clarifies the programme theory, i.e. the expected links between the evaluated intervention and its effects on the intended targets and beneficiaries.

It is usually done as a diagram with a supporting description to specify assumptions about effects and other factors to be taken into account. It should be kept simple so that it can be discussed collectively, for example to formulate evaluation questions and structure the evaluation.

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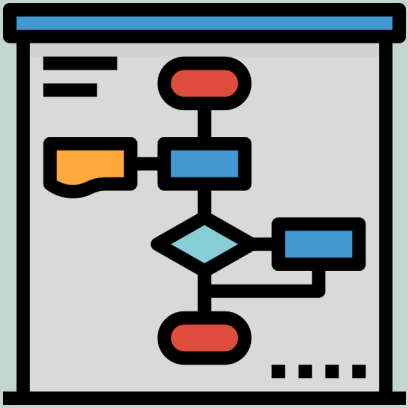
TOOL CARD

Structuring Judging

Collecting Analysing

PROBLEM TREE



PROBLEM TREE

The problem tree is a graphical tool for representing the causes and consequences of the problem that initially justified the intervention.

It is used to better understand and explain the issues that the intervention aims to address, and is therefore particularly useful for answering questions of relevance. Built collectively, it is also a tool for discussion and negotiation between stakeholders.

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TOOL CARD

Structuring Judging

Collecting Analysing

INITIAL IMPACT MAPPING

INITIAL IMPACT MAPPING

Impact mapping aims at identifying all possible desirable or undesirable consequences of an intervention, based on different sources (literature review, expert panel, stakeholders, etc.). It is especially useful for a goal-free evaluation. The map can be iteratively updated to reflect the state of the data collection and analysis.

Different methods can be used to feed the map, such as concept mapping or outcome harvesting.

TOOL CARD

Structuring Judging

Collecting Analysing

SWOT ANALYSIS

SWOT ANALYSIS

A strategic assessment tool used to better specify the objectives of an intervention or organisation, by identifying the internal and external factors favourable or unfavourable to the achievement of these objectives. It is often presented in the form of a matrix displaying an organisation's internal Strengths and Weaknesses, and external Opportunities and Threats (SWOT).

Used at the end of the evaluation, it helps summarise some of the findings in order to prepare recommendations or scenarios.

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TOOL CARD

Structuring Collecting

Collecting Analysing

MAPPING ANALYSIS

MAPPING ANALYSIS

Mapping allows for spatial analysis of the evaluated intervention. Georeferenced data is needed to do so. When it is based on a geographic information system (GIS), it is possible to cross-reference different data sets, providing a different perspective on the intervention

It is especially useful for interventions with a strong territorial dimension (accessibility of services, inequalities between territories, spatial discontinuities, etc.).

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TOOL CARD

Structuring Judging

Collecting Analysing

DOCUMENTARY ANALYSIS

DOCUMENTARY ANALYSIS

A major tool for exploiting secondary data, documentary analysis is used to take stock of existing knowledge in the light of systematic questioning. It encompasses internal (reports, notes, management documents, etc.) and external sources (press articles, studies, etc.).

It is very useful at the beginning of an evaluation to understand the context of a programme, its environment and its design, and helps building the logical model.

TOOL CARD

Structuring Judging

Collecting Analysing

LITERATURE REVIEW

LITERATURE REVIEW

Literature review is a kind of documentary analysis based on academic literature. It is generally done in answer to one or specific research questions.

In particular, the literature review helps understanding the underlying factors of an intervention, specifying what effects are plausible, according to what mechanisms, understanding factors that may explain success and failure, etc. It helps targeting and refining the evaluative analysis. Research skills are needed to do a literature review.

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TOOL CARD

Structuring Judging

Collecting Analysing

EVALUATION SYNTHESIS

EVALUATION SYNTHESIS

A kind of documentary analysis which focuses on synthesising information from a series of evaluations. Strictly speaking, the term "evaluation synthesis" is used for qualitative synthesis, and "meta-analysis" for quantitative synthesis.

This tool is particularly useful when evaluating large programmes which include many projects or sub-programmes regularly evaluated. The synthesis of evaluations of interventions similar to the one evaluated can also be useful to support a re-design process.

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TOOL CARD

Structuring Judging

Collecting Analysing

INDIVIDUAL INTERVIEW

INDIVIDUAL INTERVIEW

This tool is used to collect information from individuals, be it quantitative or qualitative, facts or opinions, direct or indirect testimonies, etc. on all aspects of the intervention (context, implementation, effects, etc.). It can be used at all stages of the evaluation.

The degree of direction and formalisation depends on the stages of the evaluation as well as pre-existing knowledge.

TOOL CARD

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TOOL CARD

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WORKSHOP

WORKSHOP

Workshops are tools for dialogue and deliberation. They bring together several participants to answer one or more research questions. Group facilitation techniques can be used. Workshops can be used in the structuring phase to understand the context, identify points of view and challenges, and specify the evaluative questions; or in later phases to discuss findings, conclusions and recommendations.

It is neither a focus group (which is only used to collect information) nor a meeting.

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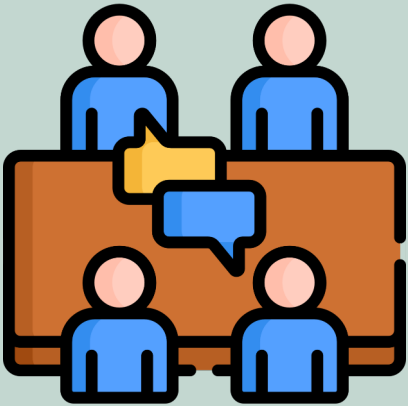
TOOL CARD

Structuring Judging

Collecting Analysing

FOCUS GROUP



FOCUS GROUP

Focus groups are used to collect quantitative or qualitative information (facts, opinions, direct or indirect testimonies, etc.) on all aspects of the intervention, usually from a homogeneous group. It can be used at all stages of the evaluation.

The degree of direction and formalisation depends on pre-existing knowledge. It complements but does not replace individual interviews. It is mainly used to collect information, unlike the workshop which is used for dialogue and deliberation.

TOOL CARD

Structuring Judging

Collecting Analysing

CASE STUDIES

CASE STUDIES

Case studies generally involve carrying out several in-depth studies of specific cases of analysis (a project, a place etc.), in order to gain an in-depth understanding of the questions studied, including through comparison between different situations.

Useful in particular when the intervention's functioning and impact are complex, poorly known (or innovative), or when it unfolds in very diverse contexts or territories.

TOOL CARD

Structuring Judging

Collecting Analysing

QUESTIONNAIRE SURVEY

QUESTIONNAIRE SURVEY

Surveys are used to collect information from individuals, be it quantitative or qualitative, facts or opinions, direct or indirect testimonies, etc., on all aspects of the intervention (context, implementation, effects, etc.).

A sample of the target population is systematically questioned. The responses may be subject to statistical processing. Surveys allow for generalisation when some conditions are gathered, such as a representative sample of the population.

TOOL CARD

Structuring Judging

Collecting Analysing

NON-PARTICIPANT OBSERVATION

NON-PARTICIPANT OBSERVATION

This tool involves observing an action, part of the evaluated intervention, from an external standpoint.

The evaluator chooses an observation point and analyses social situations, generally using an observation grid. In some cases, they may be hidden from the public (behind a one-way glass for example).

TOOL CARD

Structuring Judging

Collecting Analysing

PARTICIPANT OBSERVATION

PARTICIPANT OBSERVATION

This approach involves participating in an action, part of the evaluated intervention, with those actors in charge of implementation or the intervention's targets, ideally over a fairly long period.

By taking part in the action, the evaluator seeks to get rid of their own preconceptions or those of the dominant actors, and to understand the situation without intermediaries. This approach requires quite specific skills and a high degree of reflexivity.

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TOOL CARD

Structuring Judging

Collecting Analysing

EXPERT PANEL

EXPERT PANEL

A meeting of independent experts in the sectors relevant to the intervention being evaluated. The expert panel can be used to draw lessons from the literature quickly; to ensure a high degree of quality in the data collection and analysis; or to judge the value of the intervention and its effects.

An expert panel can be used to build consensus on complex and ill-structured questions for which other tools do not provide credible answers.

TOOL CARD

Structuring Judging
Collecting Analysing

COST-EFFECTIVENESS ANALYSIS

COST-EFFECTIVENESS ANALYSIS

This method focuses on the main effect of an intervention (which must be quantifiable) in relation to its cost.

The cost per unit of effect (e.g. cost per job created) allows comparison with other similarly evaluated interventions, and thus allows the efficiency of a programme to be estimated.

TOOL CARD

Structuring Judging
Collecting Analysing

COST-BENEFIT ANALYSIS

COST-BENEFIT ANALYSIS

A method used for the monetary valuation of all the positive and negative effects of an intervention. CBA is used to determine whether a project is desirable from the point of view of the society's general interest.

Mostly used ex-ante, CBA can be used ex-post to verify the socio-economic return of an intervention.

TOOL CARD

Structuring Judging

Collecting Analysing

BENCHMARKING

BENCHMARKING

Benchmarking consists in comparing the evaluated intervention or the organisation implementing it with others that are known for their excellence in a given sector.

It can be used to compare the performance of services against key indicators.

In evaluation, it is mainly used to understand how other organisations have dealt with those problems encountered in the intervention being evaluated, and thus to make recommendations adapted to the context.

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TOOL CARD

Structuring Judging
Collecting Analysing

SCENARIOS

SCENARIOS

Scenarios can be used to make recommendations. They identify opportunities for strategic change over a small number of key variables.

They are particularly useful for stimulating strategic discussion and transforming an intervention. Scenarios help consider changes in context.

TOOL CARD

Structuring Judging
Collecting Analysing

DESCRIPTIVE STATISTICS

DESCRIPTIVE STATISTICS

This set of exploratory statiscal methods (average, frequency, distribution…) is used to describe patterns in large sets of data. Descriptive statistics make it possible to structure and represent the information contained in data sets in a synthetic and meaningful way in order to better understand them.

Descriptive statistics can represent data in the form of graphs, tables or numerical indicators.

TOOL CARD

Structuring Judging
Collecting Analysing

TYPOLOGY

TYPOLOGY

This tool consists in defining different groups or types to facilitate the analysis, classification and study of complex realities, based on a number of observed characteristics.

Typology work can be done upstream to structure data collection; or, downstream, as a way to make the data collected meaningful.

TOOL CARD

Structuring Judging
Collecting Analysing

COST SAVING ANALYSIS

COST SAVING ANALYSIS

This type of analysis aims at establishing the long-term costs of not intervening in response to an identified social problem. These costs can then be compared to the costs of immediate intervention.

These costs are budgetary, but also include the monetisation of disadvantages to society (e.g. the cost of unemployment is established by measuring the value of the activity).

This approach is mainly used for advocacy purposes towards a potential funder, or for accountability.

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TOOL CARD

Structuring Judging
Collecting Analysing

ANALYTICAL STATISTICS

ANALYTICAL STATISTICS

Analytical statistics go beyond simple descriptive statistics. They allow, for example, identifying correlations between variables to be revealed, or typologies to be established on the basis of common characteristics.

The statistic operations can be used to assess causality links. There are different methods for this, which include linear or logistic regressions, factorial analysis, clustering, network analysis, etc.

TOOL CARD

Structuring Judging
Collecting Analysing

EVIDENCE GRID

EVIDENCE GRID

This tool is used for triangulating the data collected in an evaluation. The pieces of evidence or "clues" collected are organised in response to the evaluation questions and criteria (or sub-questions) set out in the evaluation framework. These clues are compared to confirm or disconfirm the assumptions tested, or establish a new assumption that better fits the data collected.

This tool is particularly suited to deductive/confirmatory approaches, where the intial evaluation framework remains relevant throughout the evaluation.

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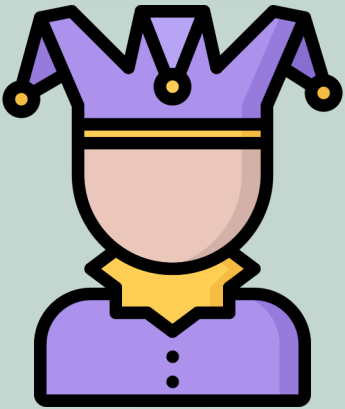
TOOL CARD

Structuring Judging

Collecting Analysing

JOKER



JOKER

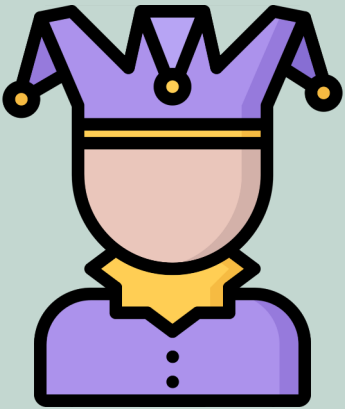
… and so many other tools: which ones would you like to use?

TOOL CARD

Structuring Judging

Collecting Analysing

JOKER



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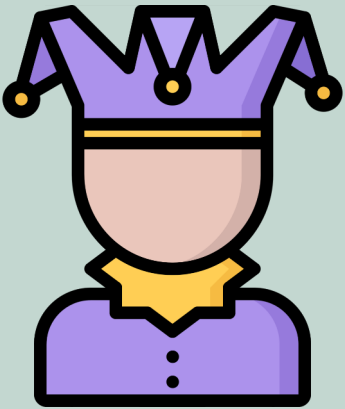

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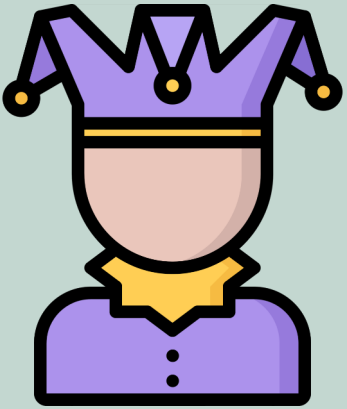

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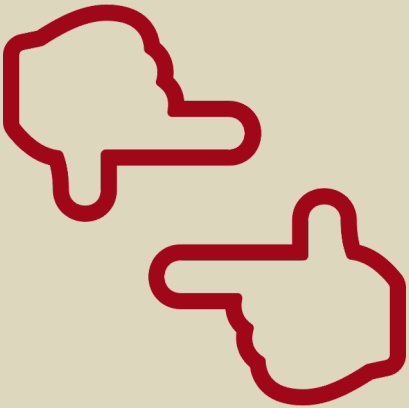
DELIVERABLE CARD

INCEPTION REPORT

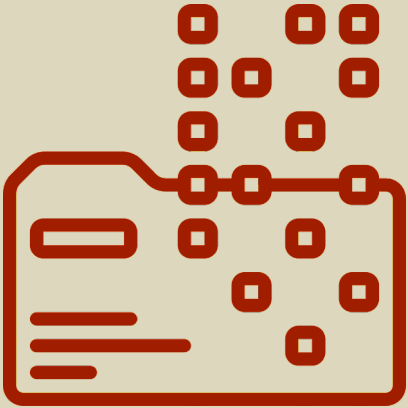


INCEPTION REPORT

A report that ends the initial phase of the evaluation, which specifies inter alia the scope of the evaluation; the questions being asked; and how the evaluation will attempt to answer them. This report is used to ensure that there is a common understanding among the evaluation stakeholders about the way the evaluation will be implemented in practice.

DELIVERABLE CARD

INTERMEDIATE REPORT



INTERMEDIATE REPORT

A report that compiles the data collected through different tools (e.g. interview synthesis, case study monographs, etc). It is usually a raw, quite detailed analysis and rarely includes cross-analyses of data. It comes during or at the end of the data collection phase. It can be used as a basis for discussing the initial investigation results with the evaluation stakeholders, and will be used as a basis for the final report.

DELIVERABLE CARD

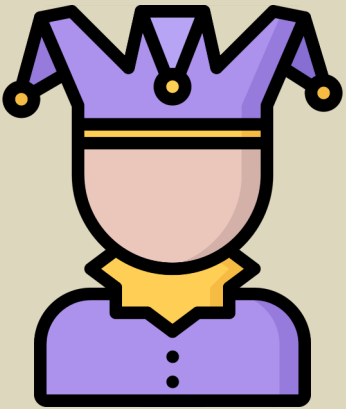
FINAL REPORT

FINAL REPORT

The document in which the evaluation questions are answered. It may include conclusions and recommendations. It should include any information needed for a clear understanding of the evaluation findings and the reasoning and data behind them. It should also make explicit the methods used and their limitations.

DELIVERABLE CARD

JOKER

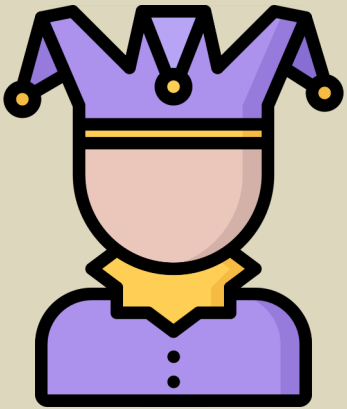


JOKER

Filmed report, Strategy Note, serious game or other… what other type of deliverable do you want to use?

DELIVERABLE CARD

JOKER



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