



# EVALUATIONS CONNECTIONS

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**THEMATIC WORKING GROUP  
FOR EMERGING EVALUATORS**

JUNE 2015

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## PRESIDENTIAL MESSAGE

Dear members,

For the first time in EES history, we are dedicating a special issue of our newsletter to emerging evaluators. Thanks to the initiative of Julia Brummer and Albine Guitard our new thematic working group has collected the insights of our younger members. From their distinctive perspective this special issue explores such salient themes as the impact of economic crises and austerity on evaluation; the use of innovative data visualization tools; the special assets that dyslexic evaluators bring to our discipline; the positive contribution of social sciences to evaluation; the underlying mechanisms that increase the influence of evaluations; discussions over evaluative methods; and the untapped potential of young evaluators due to inadequate access to information by experienced evaluators about their capabilities.

The Emerging Evaluators TWG had its first online meeting last February and is planning a “*European Virtual Conference of Emerging Evaluators*” for this autumn. I am proud of the work of this buoyant and energetic working group and count on it to further mobilize young evaluators in pursuit of better evaluation practices and applications.

Among other news the Society, in collaboration with OECD, UNESCO and the French Evaluation Society, is organising a conference “*Making effective use of evaluations in a complex world*”. This event will take place in Paris on 30 September 2015. Furthermore the Society is planning another fall event in Helsinki in collaboration with the Finnish Evaluation Society “*A Nordic Perspective and Beyond*” on the theme of the Nordic contribution to the Global Evaluation Agenda.

Last but not least, within the framework of the professionalization of our discipline, the pilot initiative on Voluntary Evaluator Peer Review (VEPR) is about to be launched under the aegis of the International Organization for Cooperation in Evaluation (IOCE), and in collaboration with the United Kingdom Evaluation Society (UKES), the International Development Evaluation Association (IDEAS), and other National Evaluation Societies.

Dozens of other evaluation activities worldwide have been triggered by EvalYear 2015 – a milestone on the road towards a more effective and influential evaluation discipline in Europe and beyond!

Claudine Voyadzis  
President

## EMERGING EVALUATORS: THE FUTURE OF EVALUATION

Julia Brümmer & Albine Guitard

Responding to the aspirations of some young delegates at the 11<sup>th</sup> EES Biennial Conference in Dublin we have established a *Thematic Working Group (TWG) for Emerging Evaluators*. Our intent is to act as a platform for interaction and debate among young and new evaluators all across Europe. We are in the process of identifying projects that will allow more involvement of young evaluators in collective evaluation endeavors. We also expect to amplify the voice of the young in EES decision making.

This initiative is in line with a global trend: given the inputs provided by the International Year of Evaluation other national and transnational evaluation associations have taken similar steps to facilitate the rise of a new generation of evaluators attuned to contemporary evaluation. One may mention that SENEVAL in Senegal has launched

a network for new evaluators, a Franco-phone Network of Emerging Evaluators has now been launched and EvalPartners has announced the launching of an EvalYouth+ initiative this year in November.

This special edition of Connections reaches out to the evaluation community. It provides insights into the realities of the evaluation workplace for young evaluators and it advocates specific actions designed to create more opportunities for young evaluators. It includes narratives that trace the *personal trajectories* of such young evaluators as Wolfgang Stuppert, Alejandra Lucero and Mariana Branco who share their motivations, challenges and expectations as they embrace the evaluation discipline. It also probes the interface between evaluation and *policy research* by an emerging evaluator (Marie Gildemyn) who started her career as a social scientist.

In pursuit of *initiatives aimed at developing the evaluation field* Sara Vaca Ana Ballesteros and Ramon Crespo, Mariana Branco, João Martinho and João Mesquita present ideas, tools and projects that would expand and promote high quality evaluation practice.

This special edition of Connections is also an occasion to note that an active involvement of all the evaluation community, including the youth, is necessary to keep the field of evaluation alive and dynamic, to stimulate its replenishment and to foster the airing of knowledge.

We trust that both emerging evaluators and those who have been around in the evaluation field for a longer time will enjoy perusing this special edition and find some inspiration for their work and thinking around evaluation!

**SAVE THE DATE  
AND REGISTER!**

**The Future of Evaluation and Evaluation For the Future – First European Virtual Conference of Emerging Evaluators**

### When?

September 19, 2015 (exact time to be confirmed)

### Where?

In front of your computer screen, or meet up with others to attend the conference together

Watch out for more information on [www.emergingevaluators2015.org](http://www.emergingevaluators2015.org)

## THE EES THEMATIC WORKING GROUP FOR EMERGING EVALUATORS

Julia Brümmer & Albine Guitard



### Who we are

The EES Thematic Working Group (TWG) for Emerging Evaluators was established shortly after the Dublin conference in October 2014. The TWG for Emerging Evaluators is an integral part of EES. Consequently, its activities are guided by the EES mission: “to advance evaluation knowledge and to encourage adoption of good practices by fostering evaluation excellence, independence and partnerships”. By now, the TWG has brought together around thirty evaluation students and young professionals through its initiatives. We are expecting the group to grow fast as we gear up to design and implement our first Virtual Conference later this year!

### Our vision and purpose

Our ambition is to be the voice of emerging evaluators across Europe. We intend to bring fresh ideas and perspectives to the European Evaluation Society. We also expect to provide a platform for young and new evaluators to start new initiatives around topics of common interest.

Thus the TWG mission is to (1) bring the ideas and perspectives of emerging evaluators into the work of EES through active engagement in the on-going activities of the society and through sponsorship of initiatives that cater to the specific needs and interests of young and new evaluators; (2) promote

a stronger interaction of new and experienced members of EES as well as different generations of evaluators, providing a platform where young and/or new evaluators can discuss and meet with more experienced colleagues; (3) connect young/new evaluation professionals and researchers across Europe through online discussions and collaboration on projects of shared interest.

### Our activities

Up to now, the TWG has been busy laying the basic technical foundations needed to communicate and to assert the TWG's iden-

tity by developing the website, choosing a logo and promoting the group in various forums and blogs. Apart from these activities, the TWG is currently implementing its first projects including the present Special Edition of Connections, and organizing the First European Virtual Conference of Emerging Evaluators.

Indeed, our big project for this year is to set up an online conference made by and for emerging evaluators.

We still need people to contribute in the organization of this event, so don't hesitate

to get in touch with us to know how you can contribute to the success of this initiative.

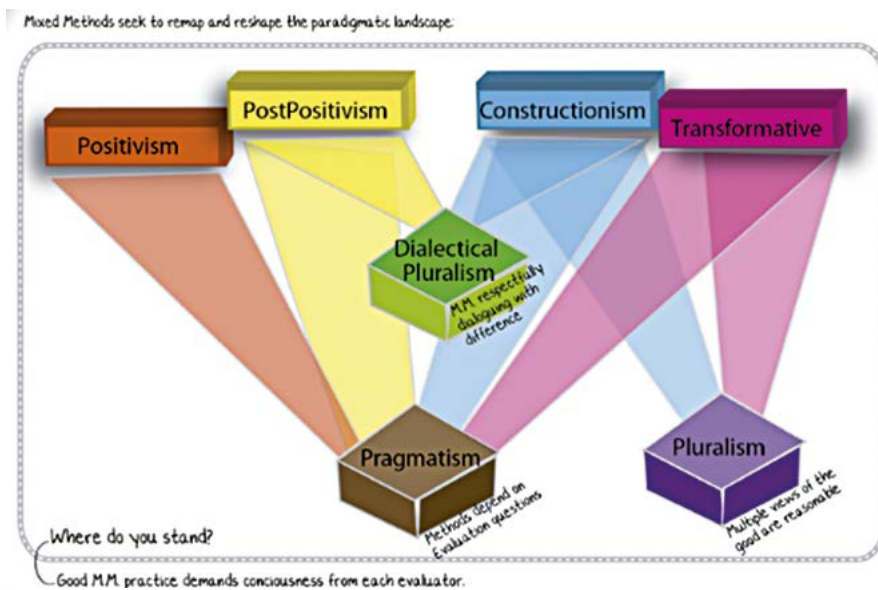
And if you want to contribute to other activities or just know more about us, don't hesitate:

- to visit our website and subscribe to our forum: <http://europeanevaluation.org/community/thematic-working-groups/twg-5-emerging-evaluators>
- to join our LinkedIn Group: EES Emerging Evaluators
- to follow us on Twitter: @EmergingTWG\_EES

## HOW DATA VISUALIZATION CAN SUPPORT YOUR EVALUATION PRACTICE

Sara Vaca

The emerging field of Data Visualization invites us to explore its countless possibilities to foster information sharing, analysis and learning in any discipline. Here are some of the potential uses of Dataviz I have experimented with so far around Evaluation, grouped by different purposes:



### Better understanding

Using infographics for understanding articles.

Very interested by new paradigms, I transformed issue n. 138 of New Directions for Evaluation into a visual infographic to better understand it.

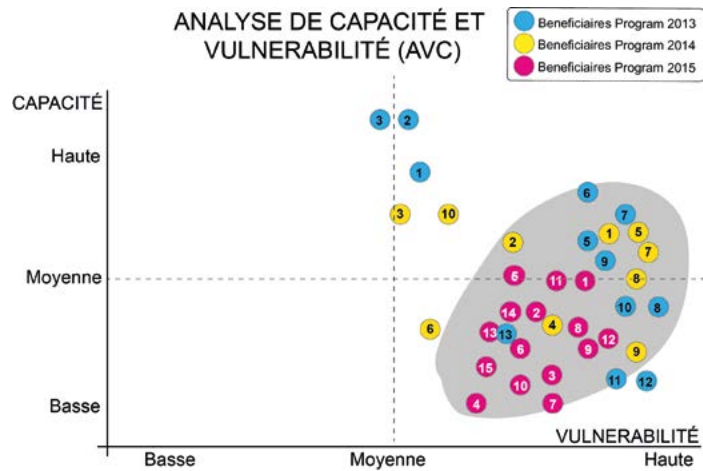
### Trying to improve Systems Thinking tools

I am currently working (along with Pablo Videira, Systems Thinking enthusiast) on how to make more visually informative Systems Thinking diagrams. System dynamics modeling approach is known to be "transparent", but working with stakeholders we realized that they are hard to understand and not so easy to decipher. So we are working on how to improve these models representations – and other systems tools such as Causal Loop Diagrams or Rich pictures- in order to make them more informative, intuitive and easier to use and understand for evaluators and users.

### Mapping vulnerability to assess beneficiaries' selection appropriateness

During an evaluation of a program for supporting very vulnerable people, we were wondering about the extent to which recipients were vulnerable.

So we created a rubric defining factors that would define a very vulnerable family in that particular context, and we did the same with capacities. Then we scored the recipients and mapped them to easily assess whether they met the characteristics we thought they should as a group.



### Logic models can also evolve

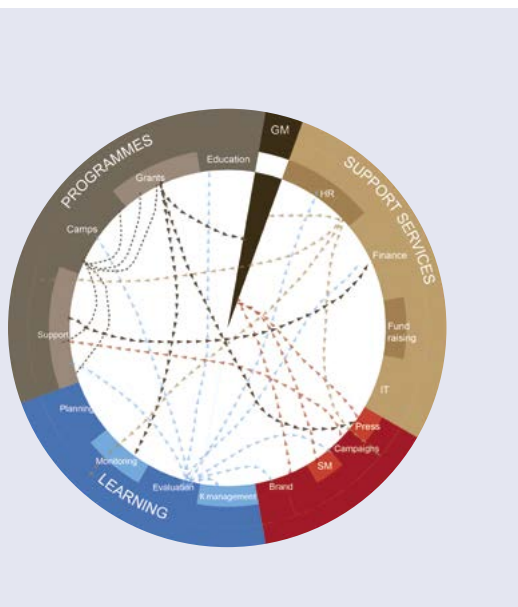
The representation of a logic model is another example of visual tools that are generally used. It can be further developed, but here is an example of a logframe matrix just adding some lines and some icons – and by the way some unneeded inky background (not maximizing the “information/ink” ratio).



### Mapping organizational charts in a circular way

Organizational charts are visual tools that we have been using for quite some time now. However, they haven't evolved much and they only seem to focus on hierarchy and reporting lines.

Challenged by this idea, I started thinking of alternative ways of representing an organization, and I came up with this circular organizational chart, which allows to map main information flows among the different areas.



### Better exercising

#### Fostering better evaluation during EvalYear

In celebration of EvalYear, I am collaborating with Joseph Barnes (ImpactReady) to create a series of visualizations to try to make advanced and responsive evaluation approaches more accessible. So far we have created: an Evaluation Metromap, a Paradigm Test for evaluators, an infographic on what is “Good and bad evaluation”, and more coming ([www.evalyear.com](http://www.evalyear.com)).

Visual key evaluation checklists

A fantastic tool for improving our evaluation practice are checklists. However, these checklists are sometimes so exhaustive that they become long and heavy. Jane Davidson and Michael Scriven suggested we could transform the amazing Key Evaluation Checklist (Scriven, 2013) into a more visual friendly tool (work in progress).

**KEY EVALUATION CHECKLIST**  
Michael Scriven

The first steps generated the list of needed resources: useful for planning, budgeting and basis for the statement of limitations of the evaluation.

Do not use or allow the use of the term "beneficiaries" for impact: not all effects are beneficial!

Values are usually needs, not mere personal preferences.

Related to checklist 2, 3, 4, 5, 6, 7, 8, 9, 10, 11, 12, 13, 14, 15, 16, 17, 18, 19, 20, 21, 22, 23, 24, 25, 26, 27, 28, 29, 30, 31, 32, 33, 34, 35, 36, 37, 38, 39, 40, 41, 42, 43, 44, 45, 46, 47, 48, 49, 50, 51, 52, 53, 54, 55, 56, 57, 58, 59, 60, 61, 62, 63, 64, 65, 66, 67, 68, 69, 70, 71, 72, 73, 74, 75, 76, 77, 78, 79, 80, 81, 82, 83, 84, 85, 86, 87, 88, 89, 90, 91, 92, 93, 94, 95, 96, 97, 98, 99, 100

**FOUNDATIONS** Important standards that will end up in the evaluation report and provide foundation for core standards.

**1.0 Background and context**

- Identify historical, recent, concurrent, and projected settings for the program;
- List contextual factors relevant to success/failure of the program;
- Identify: (i) upstream stakeholders—and their stakes—other than clients (ii) enabling legislation/statements, relevant legislation/policies (iii) any legislative/resolutive/practice or attitude changes after start-up; (iv) the underlying rationale, including official program theory, and political logic (v) general results of a literature review on similar interventions, including (vi) previous evaluations, if any; (vii) their impact, if any;

**1.1 Descriptions & Definitions**

- Check if official descriptions of the program/component/context and program logic are correct;
- Develop a correct and complete description of the first three;
- Develop the supposed program logic (no need for the correct one);
- Check implications of the field staff personality, mood/spirit, costumes;
- Explain the meaning of any technical term;

**1.2 Note any important analogies/metaphors used by participants**

- Identify:
  - Downstream direct impactees: the recipients/users of services/products
  - Downstream indirect impactees (recipient's family or co-workers, and others)
  - Midstream impactees: program staff
  - Upstream impactees: funding agency, taxpayers, and political supporters;

**1.3 Resources ("Strengths Assessment") Of the Program (not the evaluation!)**

- Check if the program made the best use of resources available (not just used)
- List specific resources available but not used in the implementation
- Include resources contributed by other stakeholders (organizations, clients)
- Ideas to realistically improve (within the resources available)

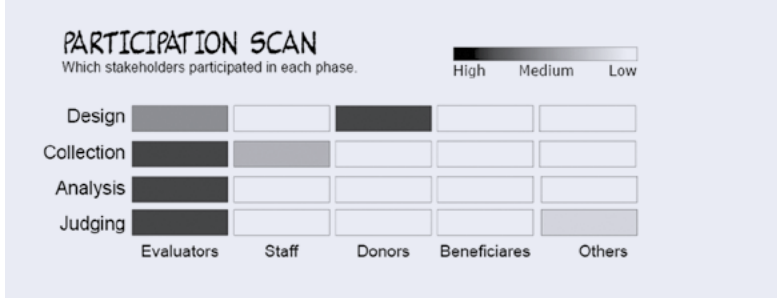
**1.4 Values**

- Identify all relevant values
- Establish a scale to measure performance relevant to merit

Better sharing

Using dashboards for reflecting about the evaluation methodology.

Dashboards are a powerful visual tool to summarize lots of information usually within only one page. Last year I created a Meta-evaluation dashboard to visualize an evaluation methodology (Vaca, 2014). Here is an extract.



Making Executive Summaries of evaluations and meta-evaluations more visually compelling

Summarizing the most relevant information – findings and recommendations – at the beginning of a report seems to be common practice. However, these kinds of summaries rely almost utterly in text and narrative explanations. I have started working with Monica Lomeña (soon PhD) to include a visual executive summary of the findings of her research on a meta-evaluation within the framework of her PhD thesis. More about this coming soon.

Visual table of contents for reports and books

Another common place in evaluation that has great possibilities for improvement are reports' Tables of contents. Nowadays they are just a list of chapters and sections, but they could be more informative about their relationship among them (are they a process?), their comparative relevance, or their length or many other criteria that seem helpful to give more information about the report's (or book's) content.

**ICONS**

- (No sign) Descriptive narrative
- Findings triangulated (see Annexe 7.5.)
- Lessons learned
- Quote from interview
- Evaluator's opinion

**Adding icons to the evaluation report**

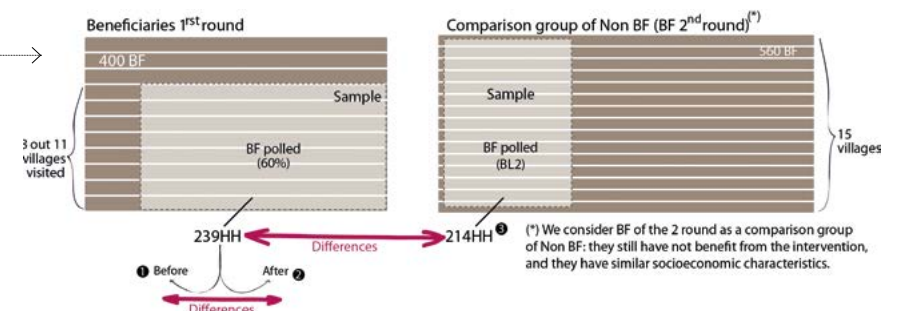
In my opinion, any initiative to increase methodological and reasoning transparency is a way to improve evaluation practice. A report may include many different types of statements coming from different sources. On some occasions I have tried to make my reports clearer by adding icons to help making a difference between:

- A particularly triangulated finding
- A lesson learned
- A quote from some participant
- An opinion from my side

Or just regular descriptive narrative to explain the program or the evaluation process.

Explaining your impact assessment strategy

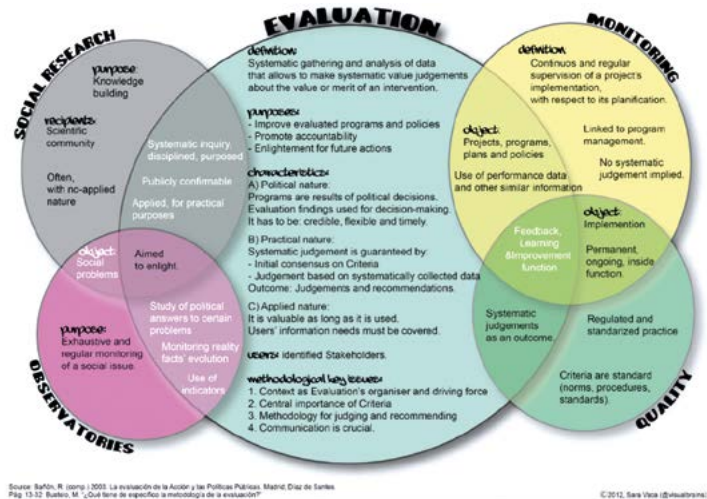
On other occasions, in the case of quasi-experimental designs to assess impact, I have found that the narrative explanation of the strategy could be complemented by a visual graph to help better understand groups of beneficiaries, control groups, total populations and sampling process.



Others

To explain complex concepts

Venn diagrams are a visual resource I am particularly fond of, for its simplicity and yet powerful way of showing relationships. When I started understanding what was specific about Evaluation and its relationships with other disciplines, I created this visual (Vaca, 2013) to explain it to myself (and to others who were interested).

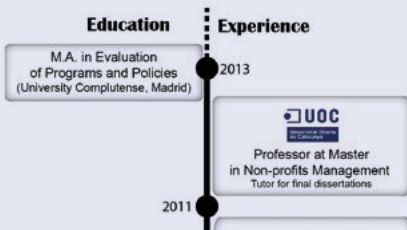


Source: Baldo, R. (comp.) (2003). La evaluación de la Acción y de Políticas Públicas. Madrid: Díaz de Santos. Pág. 13-32. Baldo, M. „¿Qué tiene de especial la metodología de la evaluación?”

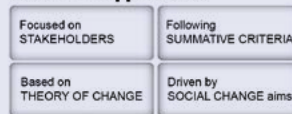
©2012, Sara Vaca (@visualbrains)

SARA VACA LOPEZ

Evaluation specialised in data visualization



Evaluation approaches



Better present yourself with a Visual CV

Another evolution I have embraced and fostered is how to present yourself. Text-based curriculum vitae seem to be the norm, but I have used new technologies and innovative ways of thinking for presenting myself in more creative ways, whenever the occasion is appropriate.

In all, huge potential for better understand and conduct evaluation that makes many (emergent) evaluators show their interest about this field. A way EES could consider to better serve this appetite of its members might eventually be creating a TWG (Thematic Working Group) around *Data Visualization for Evaluation*.

If you have any comment, I'm always happy to connect and exchange ideas (savalo@gmail.com)! (www.EvalQuality.com / @VisualBrains).

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## FROM SOCIAL RESEARCH TO EVALUATION

### Wolfgang Stuppert

How do you confidentially collect the opinions of a large group of service users who cannot read and write? When we were evaluating services for survivors of violence against women and girls in Mozambique in 2013, this was one of the main challenges our research team had to face. Our solution: (i) have questions read out to service users; (ii) ask them to answer the questions by circling symbols on a card; and (iii) have them deposit the cards in sealed boxes<sup>1</sup>.

This article is not about creative data collection. Rather it is about my motivation as a social scientist to switch from academia to evaluation as well as about what I experienced along the way. It may be of interest to other newcomers from academia as well.

### Being creative and having an impact:

Challenges such as we faced in Mozambique is what drew me to evaluation. What is the best way to gather and analyze information within a given timeframe and budget? In 2013, when I accepted the Mozambique evaluation consultancy, I was still working full-time on a PhD thesis that addressed democratization processes in Sub-Saharan Africa. By then I had received comprehensive training in research methods and I was familiar with the longstanding epistemological and methodological debates that surrounded them.

Today, as a full-time evaluator in international development (still trying to finish his PhD), I am making full use of this knowledge. Time and budget constraints call for pragmatic method choices, and the more methods an evaluator is able to choose from, the more likely opportunities for data collection are used to the fullest. Moreover, evaluation is much more about gathering data and is less concerned with academic debates about theories and concepts.

The chance to get creative with methods is not the only reason why I decided to change careers. Rather I wanted to do work that was helpful to civic activists and social movements – a yardstick of success that is uncommon in academia. By entering the evaluation field, I was able to pursue this ambition and to meet the information demands of development professionals.

I am not naïve. I know that many civil society organizations commission evaluations because donors require them to do so. They often have, at least initially, no explicit intent to learn from them. However, experience suggests that evaluations do influence users. For example, close to 80% of the evaluations that we assessed for a comprehensive review of evaluation of interventions on violence against women and girls were put to immediate use by evaluation commissioners.<sup>2</sup> In terms of impact on real-world decisions, this surely beats the academic research projects I had participated in.

### Learning to communicate research:

My transition from academia to evaluation was not without challenges. The biggest one is to find a language that facilitates interaction with clients. This is crucial for (1) writing successful offers, and (2) communicating research findings in ways that satisfy clients.

I started out as a self-employed evaluator. Without a network of loyal customers to rely on, learning how to write up research designs for open tenders in a manner that clicks with evaluation commissioners was the sine qua non for survival in my emerging career. As a social scientist, I had learned that precision in the description of research tasks and restraint with regard to the extent to which findings could inform decision-making are signs of professionalism. In my experi-

ence as an evaluator, however, this is not what makes you win an open bid. For that, less precise, yet more accessible language is important and pointing out the usability of your research is key.

In my first year as an evaluator, I have also learned that doing good research and communicating it to a diverse audience in plain terms can be equally challenging and time-consuming. For example it took almost as much time and effort to draft and revise reports, presentations and individual graphics for the review that we presented at the 11<sup>th</sup> Biennial EES conference as for carrying out the research<sup>3</sup>.

**Find a teammate:** Most evaluators in international development are former development professionals. Their previous experience in the field gives them a natural advantage in identifying the weak spots in the logical and organizational set-up of a typical development initiative. Moreover, and probably more crucially, they know how to communicate research to development professionals.

I had the good fortune to be able to join forces with a development professional turned evaluator. I brought in knowledge on methods and methodology while she brought in communication skills and everything else. Obviously, forming such a team does not make the challenges in communicating research disappear into thin air. But working as a team made it easier to tackle them. And by working in a team that wins tenders, a social scientist like me gets the chance to learn the ropes.

Many free lance evaluators and former social scientists are members of the European Evaluation Society (EES). To help them matching juniors with seniors and pairing newcomers across disciplines would be useful. Isn't EES in a unique position to provide a platform for such "connections"?

<sup>1</sup> For more information on the procedure, see a blog post of my colleague on <http://www.developblog.org/2015/01/a-written-survey-with-people-who-dont.html>.

<sup>2</sup> A dedicated blog provides a detailed account of our research process and findings ([www.evawreview.de](http://www.evawreview.de)).

<sup>3</sup> The main contents of the poster were later presented in an article for Connections (Nov 2014, pp. 12–13).

## COPING STRATEGIES AND COMPARATIVE ADVANTAGES OF A DYSLEXIC EMERGING EVALUATOR

Mariana Branco

### Introduction

I never finished any school test on time. My writing was always full of misspellings. My primary teacher always accused my sisters and my best friends of doing my compositions and homework.

It turns out that I was diagnosed with dyslexia at the age of 16, a neurobiological difference that encompasses between 5 and 12 percent of the European population (European Dyslexia Association). Since then I secured a bachelor degree in economics as well as a master's degree and I am now a social impact evaluator. In this article I document what is like to be an emerging evaluator with Dyslexia, presenting its challenges, coping strategies and comparative advantages.

### Challenges

Dyslexia causes difficulties in word recognition, decoding, expressing thoughts; poor spelling; slow rate of writing and troubles finding the "right" word when speaking (The International Dyslexia Association). Factors that lead to additional time needs: *«young adults with dyslexia needed more time to process linguistic and nonlinguistic stimuli»* (Kim S, 2014).

Since my dyslexia was diagnosed before attending University, I had extra time to finish the exams and got in. I was given time at University exams too. However, I also needed the same extra time to study, therefore, combining studies with other activities was not always easy.

When I completed my economics training, the educational psychologist who had diagnosed my dyslexia told me she couldn't believe it and wanted me to take an IQ test. I didn't feel comfortable with the idea as for me having dyslexia had always been a stigma,

like for many other dyslexic kids (Sankara, 2010) – some used to make jokes about how smart I was to fake dyslexia in order to have extra time, others just thought having dyslexia meant to be dumb.

I didn't really care about the IQ and always thought she was probably over-reacting – after all, the biggest challenge was about to come: why would an employer hire someone with a good IQ who takes more time to complete the work!? A problem faced by many others as well (Brown, 2000), but of particular importance in the field of evaluation, where time and resources are scarce relative to the complex reality one has to assess...

### Coping Strategies

As an emerging evaluator, managing dyslexia challenges has been a life changing adventure. In the evaluation industry meeting deadlines, reporting and analyzing are foremost skills. Adapt or die as Darwin would have said if he had been a "strong enough species" to live until today.

I've been searching for strategies to cope with dyslexia. The latest one has been to become my own "manager controller". Simulating this has enabled me to daily calculate my time allocation, estimate my 'margin of error' and monitor my performance. Since then I take account of this margin while planning and budgeting my time.

The success of this approach can be measured in terms of increased motivation and self-confidence. In turn this has increased my work capacity and efficiency. Besides, these strategies have inspired the implementation of a management control system in my company.

Likewise, visual organization and hearing stimulation are of great importance to me. While in college I used to transform my

home windows into chalkboards and talk loud about every subject, pretending I was a teacher while studying for tests – a strategy documented by Finn and colleagues (2014): *«dyslexia readers rely on laborious phonology-based "sounding out" strategies into adulthood»*.

Those windows soon became a whiteboard: unfortunately my mom and chalk powder weren't best friends. Today, I find that whiteboards, white paper and flipcharts are essential for structuring evaluations. Actually, everything that helps me process ideas (like online calendars, colors, post its, markers...) are precious tools in my daily work.

As a student I used to summarize and highlight everything. Yet, for some reason I stopped doing it. I resumed the practice last year when I realized how stressed and overwhelmed I felt at work. Today I feed daily a colorful and almost childish notebook with everything I have to do regarding my evaluations.

One tendency I have tried to overcome is the use of complex conceptual processes to address simple ideas. This is of special importance in low budget evaluations. In such cases self-consciousness and team work have been critical. When I am complicating, either I stop and reboot or I talk with colleagues. The opposite happens as well, i.e. I talk with colleagues to prevent over-complicating things.

Both my colleagues and my supervisors have helped me to tackle the challenges I face. My company has an editing department that reviews my reports and corrects my misspellings. It also has flexible working hours and a goal oriented corporate strategy that values multiple working methods. It promotes open communication and allows frank discussion of failures and celebration of strengths.



## Competitive advantages

Having dyslexia has given me some curious competitive advantages in the field of evaluation.

It is said that «*children and adults with dyslexia are highly creative, and have many cognitive and emotional strengths, despite a weakness in decoding words (...) often find alternative ways of gathering knowledge and innovate strategies to learn, work, and achieve in life*» (The Yale Centre For Dyslexia and Creativity).

Similarly, many authors refer dyslexics as “Space Thinkers” who think in pictures instead of words, perceive multi-dimensionally, experience thought as reality and have the «*ability to look at the bigger picture, conceptualizing the world in terms of detailed stories*» (Brightstar Community).

Being a space thinker enables good modeling and structuring skills, essential to deal with a lot of information, to work with data bases and to plan actions. Experience thoughts as reality is of great help to map problems, as well as for understanding the process of social change. Thinking in pictures, besides being quite funny sometimes, allows me to express myself through analogies. It has brought more authenticity to my presentations and also inspired me to create new materials for *stakeholders* engagement and training.

Moreover, having dyslexia has improved my ability to understand other’s learning difficulties – helpful when guiding others but also

when interviewing stakeholders. Along with those advantages having this neurological difference develops major soft skills like ability to face failure and discipline which, in the end are useful in any type of profession.

## Conclusion

No matter how challenging dyslexia can be, it opens new avenues and it allows to reap profit out of differences. Nevertheless, it would have been harder for me to succeed if my education system hadn’t recognized my special needs or if my colleagues and employers hadn’t been cooperative. I believe that an organization like EES should provide a forum where people with different talents and qualities have the opportunity to contribute to the development of the theory and practice of evaluation.

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## EVALUATION OPPORTUNITIES AND CHALLENGES: AN EMERGING EVALUATOR PERSPECTIVE

**Maria Alejandra Lucero**

It all started when I was asked to join a teaching team for a “Social Planning” course at the National University of San Juan (Argentina). I was then in my last year of studies to become a Social Worker. It was a course that I loved and wished to learn more about. I accepted the position in 2011 and, since then, I have been member of a teaching and research team that also includes my tutor and supervisor. One year later, in 2012 I became a Social Worker and now I am Master of Development and Cooperation candidate.

In addition, I am a research fellow at the Socioeconomics Research Institute (ISE) of the Social Sciences Department in the National University of San Juan (UNSJ) working on Gender, Sustainability and Evaluation. When I have the opportunity, I also work as a freelance consultant.

Considering evaluation as a systemic process that analyzes the results and goals of programs, how achievements are reached and how to improve them (Scriven, 1995;

Rossi *et. al.*, 1999), Social Workers, as promoters of development, should be directly involved not only in the design and execution of policies but also in their and evaluation. However, their actual contribution is limited. Since I feel that social workers can contribute to the quality of public policies and programs through evaluation I became an active member of the Argentinean and Latin American networks on Monitoring and Evaluation (EvaluAR and ReLAC) and of the European Evaluation Society (EES). I have

been involved in the creation and administration of the EvaluAR<sup>1</sup> website and I have contributed to the IV Conference of ReLAC<sup>2</sup> that took place last March in Lima.

### **A path, few opportunities and various abilities and perspectives to offer**

Evaluation has matured. The need to analyze the processes and results of development policies and programs through evaluation is increasingly recognized as a pre-requisite for generating equitable societies. However it is quite hard for an emerging evaluator to break into this field without outside support. Most calls for proposals and job applications demand experience as a guarantee of quality. However, what about the vision and contributions of new practitioners? As a young and new evaluator, I find few job opportunities that fit my profile. Having spirit and will is not enough in an exclusive system that keeps people out.

The number of professionals with high qualifications but little experience is growing. Many students have no choice but to keep studying as a strategy to improve their chances of getting into the labor market. As time goes by, they find that the qualification and experience requested by employers keeps rising. It is never enough. Moreover, gender discrimination can come into play.

Even as we promote the mainstreaming of the gender approach in evaluation practices, are we doing enough inside our networks to comply with its tenets?

### **Challenges for the evaluation community**

The international year of evaluation declaration is key for our community. This should be seen as the start of a new era supportive of equitable and sustainable development. The new development agenda proposes to consider environmental sustainability and gender mainstreaming. These two priorities must be taken into account when designing, implementing and evaluating policies, programs and projects. They can no longer be seen as secondary aspects of our work. Development strategies should be reinforced to address global welfare of our planet.

New perspectives need to emerge in order to promote a better environment. Here is where emerging evaluators could have an active role. They can contribute to a real transformation of society. While organizations can provide and promote capacity building and opportunities, emerging evaluators can provide fresh perspectives and new ideas.

Experienced professionals should include young professionals in their teams as a way to train them. Pushing young professionals

into volunteer jobs is a way of securing highly qualified professionals at low cost. The argument "I did it too, you have to pay your dues" legitimizes the wicked and unfair situation in which young professionals find themselves when looking for a job. Meanwhile, the possibilities to learn and offer their (our) knowledge go further.

In my opinion, the challenge that evaluation societies, associations and networks have to take on is the creation of an enabling environment in which the evaluation community, including professionals, commissioners and the society – can benefit from mutual learning. A change of perspective about the learning paradigm should come about: older and experienced people have the knowledge and younger people have the energy and motivation. A horizontal paradigm of learning should be put into practice.

Since the field of evaluation has won more legitimacy within society over the last decade, now is a good time to promote the constitution of teams made up of members with different levels of experience. Inclusion of emerging evaluators in tenders should be part of this vision. Promotion of this approach by societies, associations and networks would give young professionals a possibility to grow and find their place in the sun. I truly believe that they have a lot to learn but also a lot to give. They deserve an opportunity to do so.

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<sup>1</sup> <http://revaluar.wix.com/evaluar>

<sup>2</sup> <https://conferenciarelac.wordpress.com>

## FROM RESEARCHING EVALUATION INFLUENCE TO INFLUENCING EVALUATORS AND EVALUATION RESEARCHERS

Marie Gildemyn

While carrying out research on evaluation influence, I have felt compelled to think about how researchers can influence the wider evaluation community. Accordingly this article has three objectives. First, it summarizes my PhD research centred on the influence of monitoring and evaluation within a developing country context. Second, it highlights some of the challenges that emerge when doing research in/about evaluation, especially from the perspective of a young researcher. Last, it proposes two concrete ways in which EES can support emerging evaluators and researchers.

### Research context

I have recently completed my PhD in Development Studies at the Institute of Development Policy and Management at the University of Antwerp (Belgium), where I am currently employed as a post-doctoral researcher. My research team, composed of a mix of southern and northern researchers, carries out research on the following topics: (i) national M&E systems including National Evaluation Societies; (ii) comparative analysis of sector and local M&E systems; (iii) informal M&E systems and networks, (iv) M&E and gender; (v) M&E and climate change; (vi) performance-based financing; (vii) evaluation use and influence; (viii) use of ICT in M&E. The Institute also offers a Master Programme in Development Evaluation and Management as well as a short course on Strengthening National M&E capacities and use.

### From researching evaluation influence...

My own doctoral research (Gildemyn, 2014a) looked at the role and influence of Civil Society Organisations (CSOs) involved in the monitoring and evaluation of government programmes and policies in Ghana. Following changes in the aid architecture, more than a decade ago, CSOs have been increasingly involved in the monitoring and evaluation of government programmes and policies, either through their participation

within the national M&E system or outside this formal system under the form of social accountability initiatives.

To study the influence of CSO-led M&E a conceptual framework was developed that draws on a broad range of literature focused on (social) accountability, governance, evaluation use and influence and the knowledge-policy interface. Central to the framework is the Theory of Evaluation Influence developed by Henry and Mark (2003) and Mark and Henry (2004). Using a case-study approach, including qualitative comparative analysis (QCA), the research sets out to understand the role and influence of CSO-led M&E in Ghana, both within and outside the national M&E system, by focusing on its two main objectives (accountability and feedback/learning). The main findings are summarized below.

Studying CSO-led M&E through the accountability lens reveals that CSOs can create soft pressure on government officials to become more answerable by simply carrying out M&E activities. In addition, CSOs create informal accountability forums in which their M&E findings are discussed and compared to the available 'official' information, which further strengthens the answerability dimension. On the other hand CSO-led M&E and CSOs in general, are less successful at imposing or triggering sanctions if public officials fail to provide satisfactory answers or in case of poor performance (enforceability dimension).

Looking at CSO-led M&E through the evaluation influence lens sheds light on the underlying processes that occur during data gathering and the discussion of the M&E results within the available dialogue spaces, whether created informally or as part of the formal M&E system. The research also contributes by mapping the different influence mechanisms that occurred following CSO-led M&E at the district level, more specifically through the in-depth examination of the work of SEND-Ghana (a Ghanaian CSO).

Moreover, the research identified two additional influence mechanisms '**pledges for action**' (motivational category) and '**one-time action**' (behavioral category) (Gildemyn, 2014b). The other important finding is that the interface meeting can play an important role as a catalyst of certain influence mechanisms. The uncovered influence mechanisms, including the link between the motivational and behavioral mechanisms, were further examined using QCA. The analysis confirmed the previous findings in a greater number of districts and uncovered different pathways or combination of conditions that are able to explain behavioral change at the district level.

In one of its concluding recommendations the research argues that CSO-led M&E should not only be examined from the (narrow) perspective of accountability, but also focus on the other, broader range of processes CSO-led M&E can trigger at the local and national level. This is especially important for CSOs which are carrying out M&E activities funded under the social accountability agenda. More empirical research on the influence of evaluation is needed, especially within a developing country context. In general, funding agencies and developing partners still expect evaluations to have a direct, instrumental impact on programmes and policies and are unaware of the broader range of ways in which evaluations can influence thought, motivation and action.

### ...to influencing evaluators and evaluation researchers

Other important challenges arise when doing research in/about evaluation. One of them is the well-known tension between evaluation theory and practice. Evaluation theories are often perceived as too abstract and complicated for concrete application. On the other hand researchers do not explore the rich and practical experience of evaluators systematically or sufficiently. This results in a lost opportunity to influence evaluation theory. Because EES brings together practi-

tioners and researchers, it is in a key position to address this challenge. For example, researchers could develop a mechanism or tool to study the influence of evaluations that are carried out by EES members in a more systematic way.

There are a number of ways in which EES could support emerging evaluators and researchers. First, EES should continue to provide a platform for young researchers and evaluators to present their work and ideas,

and to develop new initiatives. The best student paper award at the EES conference, the creation of the TWG for Emerging Evaluators and this special edition of Connections are important steps in this direction. Another idea is the creation of a database or network in which emerging evaluators and researchers can specify their area of interest (and experience). When calls for expressions of interest to carry out evaluations are published more experienced evaluators could consult this database/network and invite

these young evaluators to form part of the evaluation team. This would be a practical way for emerging evaluators and researchers to gain experience and expertise while simultaneously lowering the threshold to answer such calls. Especially for young researchers it is not easy to develop practical evaluation skills. From their part emerging evaluators and researchers could contribute new ideas, theories and methodologies, and in that way influence other evaluators and the field of evaluation in general.

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## INNOVATION IN MOTION: SOME EXAMPLES OF EVALUATION CAPACITY-BUILDING INITIATIVES IN THE SPANISH STATE

Ramon Crespo, Ana Ballesteros

Evaluators are doing new things in a novel way in the Spanish State. They are taking the lead in promoting innovative capacity building by inventing and implementing unusual solutions to evaluation related issues (e.g. to properly size, value and legitimate evaluation related costs; to use and socialize evaluation rapports; to foster evaluation culture among public services; etc.)

Most of those initiatives focus on creating social value (not just private value), they include social processes of innovation such as open source methods, and they greatly contribute to mediating dialogue between public, private, and nonprofit sectors.

The purpose of this article is to present two evaluation capacity-building initiatives, which illustrate the manner in which an emergent

way of functioning has been set up by emerging evaluators in the Spanish State.

### Evaltokia – Evaluation observatory

Evaltokia is a voluntary and community-owned process aimed at **identifying and organizing all evaluations carried out in the Spanish State** by public administrations in all sectors.

Their objectives include to generate insightful knowledge about how developed the evaluation culture is within different sectors and regions in the Spanish State and to visualize those who are in a well-developed (and a not so well-developed) position. People who are running Evaltokia are convinced that this visualization will indirectly operate as an

accountability mechanism for those policy makers who worry about the evaluation state of the art in their area of influence. Therefore, fostering evaluation culture is obviously under Evaltokia's rationale.

Evaltokia crystallizes into a **community-operated website** (evaltokia.net) which serves as an **Open Database** (ODbL) with evaluations data that can be introduced and consulted by anyone interested. Using Evaltokia's database is free and everyone in the field is invited to disseminate the website in order to integrate as many evaluations as possible.

Up to 25 evaluation-related professionals are voluntarily involved in Evaltokia's energizing and maintenance tasks. Some of these tasks consist in actively inviting public services to

list their evaluations in Evaltokia, and verifying that all the information listed actually refers to an evaluation and not to other kinds of productions like a memorandum or a research.

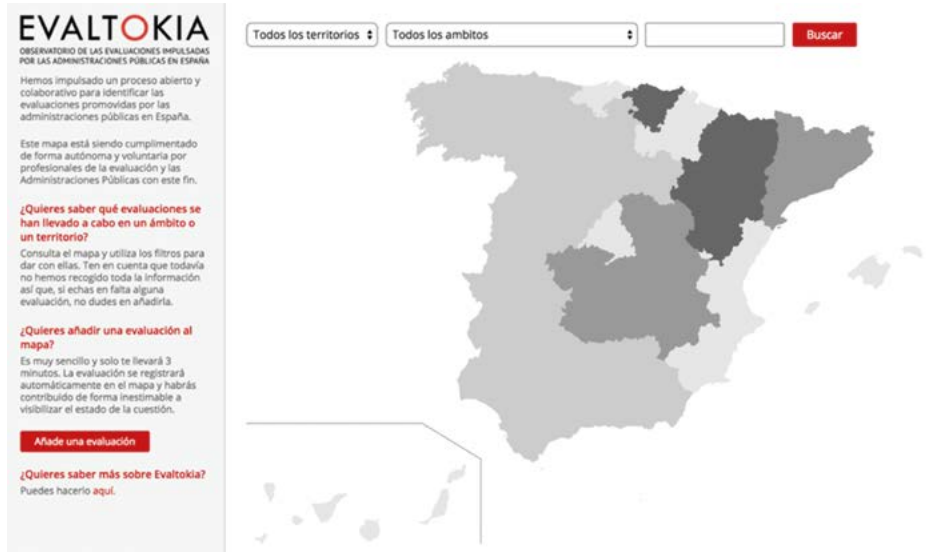
All these professionals operate as Evaltokia delegates when it comes to introducing the initiative to any public service in the Spanish State. In order to work more efficiently and avoid duplications, they organize themselves by distributing the work according to delimited regions and particular fields of action (social services, health, international cooperation, etc.). The only requirement to be considered as an Evaltokia's delegate is to make a commitment to actively work on the project for a renewable period of six months. Everybody is welcomed to join the distributed network of Evaltokia's territorial agents.

For those who carry out, command, use or study evaluations, Evaltokia is of great help because it shows what evaluations have been carried out by public administrations in a given region or country. Furthermore, it is indeed a significant and useful way to bring evaluation professionals together, truly contributing to brokering a dialogue among different sectors and fostering metaevaluation synergies between them.

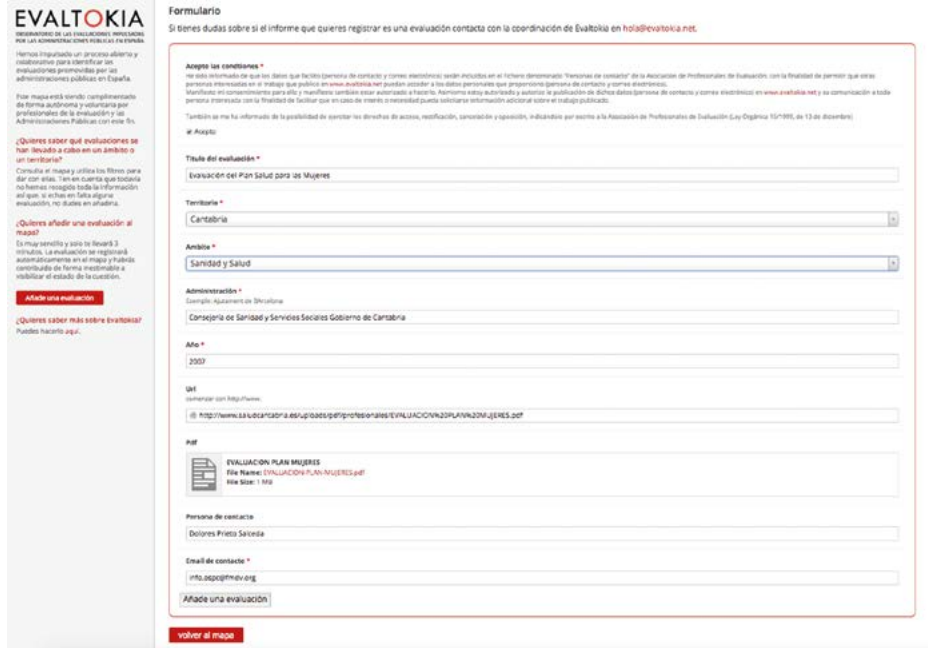
### Evaluation Cost

“EvaluationCost” is a web based solution (evaluationcost.com) that lists tasks common to different evaluation processes which calculates an estimation of the time required to accomplish them, and provides the total time required to carry out an evaluation.

People behind this tool consider that there is a distorted idea among commissioners in the Spanish State as to what an evaluation implies. It is not unusual to come across evaluation tenders for a complex evaluation in a foreign counterpart country valued at less than € 5,500, which obviously will exhaust the available budget on logistics related costs such as trips, transcriptions and taxes. Given the fact that commissioners commonly see that after publishing evaluation tenders with a very tight budget they still receive plenty of applications, it seems quite reasonable to think that some of them are honestly convinced that what they usually budget is the actual cost of an evaluation (ignoring that



**Evaltokia's screenshot 1:** Main page of Evaltokia's user interface. Everyone interested can use the map to navigate through the database and do a search filtered by region or sector. Searching by keyword also applies. Regions on the map are color sensitive according to the number of evaluations stored.



**Evaltokia's screenshot 2:** Just by clicking on the button form, anyone can easily introduce key evaluation related information into the database.

maybe evaluators have either very low wages or none at all).

“EvaluationCost” pretends to shed light on this situation by helping both commissioners and evaluators to go through the evaluation

rationale, either jointly or independently, and thus increase awareness of what an evaluation process actually implies, achieving fairer employment relations and improving the balance between existing resources and required quality in conducting evaluation.

## Evaluation capacity building

More than 250 evaluators have been trained in evaluation by the Master on Public Policy Evaluation at the Complutense University of Madrid in Spain.

Due to some continuous training initiatives promoted by the Master such as its biannual evaluation seminar, its free listeners plans for alumni or its digital communication and content sharing strategy, connections among emergent evaluators have been strengthened over the past 13 years. Actually, it might not be inappropriate to interpret that this informal network is at the core of the two initiatives described above, given the fact that all evaluators involved are somehow connected with that Master related network (e.g. master's alumni, seminar attendees, etc.)

Furthermore, all these evaluators are connecting bottom-up and some new organizations are being created to structure the whole thing in the Spanish State. Groups of people get spontaneously involved in evaluation related activities of their interest, and a brand new *Iberian Voluntary Organization of Professional Evaluators* (which is actually joining NESE since October 2014) has been recently set up to

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-Preparación de la Propuesta							
-Búsqueda, obtención y lectura de información							
--Recopilación o búsqueda de información							
--Lectura (páginas)							
--Entrevistas, contactos, ...							
-Elaboración de la oferta							
--Parte técnica y económica de la oferta							
--Parte administrativa							
-Firma del Contrato y Formalización del Acuerdo							
--Lectura, revisión y consulta de los acuerdos							
-Conformar equipo de evaluación							
--Selección, entrevistas, reuniones, etc., con el equip							
Horas	0	4	8	16			33
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### Evaluationcost's screenshot I: Setting for the 1<sup>st</sup> steps in the case of a response to a call for tender to request an evaluation.

catalyze, visualize and promote all these kinds of intangible dynamics (magic) at the very core of any kind of capacity building process.

Like everywhere else, things are moving fast around here. But we do have a strong impression that a deep change is operating right now among emerging evaluators in the Spanish State. Needless to say, if you would like to get in touch with any of these groups, please email their contact persons at:

#### Evaltokia:

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## EVALUATION OPPORTUNITIES IN PERIPHERAL COUNTRIES IN TIMES OF ECONOMIC CRISIS: IDEAS FROM PORTUGAL

### Mariana Branco, João Martinho and João Mesquita

In times of budget austerity the perceived importance of evaluation tends to increase. Such is the case of some peripheral European countries affected by the global financial crisis.

In this article, we briefly discuss 1) the evaluation culture in Portugal; 2) why we believe that in the aftermath of the on-going socio-economic crisis and the associated economic adjustment programme, there might be opportunities for the blossoming of a Portuguese evaluation culture; 3) how to support the empowerment of young and emergent Portuguese evaluators.

Evaluation culture is difficult to define (Martinez, 2010). According to Barbier and

Hawkins, there is no universally accepted definition for this concept. Yet it can be described as the set of codes, standards, guidelines and principles that shape the practice of evaluation, its uses and its development. Thus defined it constitutes a shared if informal policy framework that generates a distinctive identity and a common language among evaluators.

As Scriven (1996 in Hogan, 2007) states: "evaluation is a very young discipline – although it is a very old practice". Scriven himself, with Stufflebeam and Madaus (1983), proposed understanding the history of evaluation by splitting it into six periods: the "Age of Reform", before 1900; the "Age of Efficiency and Test-

ing", from 1900 until 1930; the "Tylerian Age", from 1930 to 1945; the "Age of Innocence", from 1946 to 1957; the "Age of Expansion", from 1958 to 1972; and the "Age of Professionalization", from 1973 to the present.

The fourth period, "Age of Innocence", illustrates quite well the state of Portuguese evaluation culture prior to 2011: "while there was great expansion of education, optimism, plenty of tax money, and little worry over husbanding resources, there was no particular interest on the part of society in holding educators accountable" (Madaus et al., 1983).

On the other hand, any resemblance between the fifth period, the "Age of Expansion", and

the current Portuguese situation may not be purely coincidental: “there was no professional organization dedicated to evaluation as a field, nor were there specialized journals” (ibid.) and “the field of evaluation was amorphous and fragmented – many evaluations were carried out by untrained personnel” (Guba, 1966 in Madaus et al, 1983).

For the authors this age “marked the beginning of profound changes that would see evaluation expand as an industry and into a profession” (...) “to help the needy came concern in some quarters that the money invested in these programs might be wasted if appropriate accountability requirements were not imposed” (idem).

In Portugal, evaluation has been almost exclusively driven by accountability obligations imposed by external funding and promoted through International Institutions like the World Bank and the EU. This situation has led to evaluations that are best characterized as mere bureaucratic or administrative exercises demanded by superior hierarchies.

The maturation process of a true culture of promotion and dissemination of evaluation and the training of its practitioners is thus at a primary stage of development. The absence of academic training (there is no master's or graduate evaluation degree in Portugal), nor proactive communities of practice, are additional factors that have hindered the development of a professional class able to promote learning; to make room for younger and emergent evaluators and to promote relevant evaluation research.

While sectorial national evaluation societies have multiplied (Portuguese Association for Impact Assessment, Network Assessment Project Association), no genuine evaluation culture has yet emerged. The National Evaluators Association has been practically inert since it was created. Other small and informal networks have promoted some short-term training activities of variable quality in specific and narrow areas.

These constraints have made it difficult for evaluators themselves to professionalize and develop the language, standards, norms and guidelines that are essential for the development of a national evaluation culture. No distinctive evaluation family is readily identifiable and the work developed by the peers is not recognized.

Valuing evaluation as a vehicle for learning, organizational and policy improvement and encouragement of democratic transparency are distant prospects. More often than not evaluation is perceived as a threatening exercise.

Much remains to be done in order to usher evaluation in Portugal into the “Age of Professionalization”. Yet there are opportunities since as Rossi et al (2004) remarked: “Regardless of political trends, two points seem clear about the current environment for evaluation. First, restraints on resources will continue to require funders to choose the social problem areas on which to concentrate resources (...) Second, intensive scrutiny of existing programs will continue because of the pressure to curtail or dismantle those that do not demonstrate that they are effective and efficient”.

Last but not least, promoting policy convergence in the Eurozone requires fulsome democratic debate informed by evaluation in peripheral countries: “Especially in turbulent times of economic crisis, monitoring and evaluation specialists must demonstrate how they can bring information to bear on real-time issues facing decision makers” (Imas, 2011). That is why we want to gather Portuguese emerging evaluators to exchange experiences, work collaboratively and eventually inspire emerging evaluators from countries in similar situations to do the same. After all, who better than emerging evaluators to develop an “emerging profession” (Madaus et al, 1983)?

Organizations like EES should gear up to help develop national movements of evaluators. Actions like the “buddy initiative” at the last EES conference in Dublin, the creation of a thematic working group for emerging evaluators and this Connections special issue are promising signs. If it hadn't been for such initiatives we wouldn't have known each other, nor would we have written this article.

Thus it is very important to promote networking among emerging evaluators; to trigger a wider debate regarding the development of networks/associations of emerging evaluators in Europe; to enhance the dissemination of best practices across countries; and to design a toolkit on how to build a national network/association of evaluators. Finally, creating a strand focused on these issues at the next Biennial Conference and encouraging more involvement by emerging evaluators would be of great value.

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Wolfgang Stuppert is an evaluation consultant and social scientist. His areas of expertise are the design and implementation of surveys as well as the development of qualitative evaluation methods, in particular in the fields of gender-based violence and youth education. Wolfgang's academic research focuses on protest, civil society development and democratization. He is a founding member of the Berlin Institute for Protest and Social Movement Research and a PhD candidate at Humboldt University of Berlin.



## Sara Vaca

She is an Independent evaluator at EvalQuality.com specialized in Humanitarian projects, Information management and Data Visualization (dataviz), blogger at VisualBrains.info. Almost at the same time she started to engage professionally with Evaluation, she started exploring the countless possibilities of dataviz. She experimented with new ideas that could at some level help us to do better evaluation.



## Claudine Voyadzis

Claudine Voyadzis has spent some 20 years working in the evaluation field. Her work consisted mainly of appraisal and monitoring of projects and programmes, impact studies and ex post evaluations in West and East Europe and in Africa. She earned her Ph.D. in the United States in Demography and Sociology and has a dual experience of Anglo-Saxon and European approaches to evaluation. After working in the Independent Evaluation Group of the World Bank in Washington, she joined the Council of Europe Development Bank in Paris as technical adviser for project appraisal and monitoring. Subsequently she was appointed to set up the Ex Post Evaluation Department and remained for six years as Director of the Department. Claudine Voyadzis works now as an independent consultant, and leads evaluations for multilateral organisations and consulting firms.

