



SESSION 9

Case Study 2

Evaluation matrix

Reading an evaluation matrix to judge the quality of an evaluation methodology

- Your evaluators have just shared the first version of the Inception Report
- The report contains the consolidated version of the Evaluation Questions; they are well developed and make reference to the Intervention Logic. You agree with their proposed formulation
- They have also formulated their methodology, i.e. how they plan to answer the evaluation questions.
- **What elements do you need to be able judge if the proposed evaluation methodology is appropriate?**

One key tool: the evaluation matrix



Activity | Case Study

Analyse with your group the evaluation questions, the evaluation criteria, the indicators...

Discuss which evaluation tools would be most appropriate to collect information in the case of this evaluation.



Evaluation matrix, key structuring tool



Evaluation matrix: Basic structure

Criterion.....

Question # “XXXXXXXXXXXXXXXXXXXXXXXXXXXXX?”					
Judgement criteria	Indicators	Baseline	Information sources		Tools
			Primary	Secondary	

Anything missing ?

Other elements can be added, but it is key to preserve an equilibrium between simplicity and completeness.

Evaluation matrix: advantages

Criterion.....

Question # “XXXXXXXXXXXXXXXXXXXXXXXXXXXXX?”					
Judgement criteria	Indicators	Baseline	Information sources		Tools
			Primary	Secondary	

- Helps evaluators structure their methodology
- It's schematic, clear, simple to read
- It is specific to a given question (horizontal reading)
- It allows for vertical reading, per evaluation criteria

Evaluation matrix: advantages

Criterion.....

Question #

"XXXXXXXXXXXXXXXXXXXXXXXXXXXXX?"

Judgement criteria	Indicators	Baseline	Information sources		Tools
			Primary	Secondary	

- It visualizes the criteria that evaluators will use to answer to each Evaluation Question (you can structure the matrix per sub-question, as well).

Evaluation matrix: how to read & check

Criterion.....

Question # "xx?"					
Judgement criteria	Indicators	Baseline	Information sources		Tools
			Primary	Secondary	
					

- Per each criterion (or sub-question) the matrix shows the indicators and (where available) the baseline data.

Evaluation matrix: how to read & check

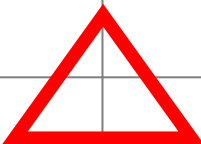
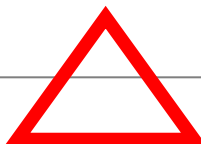
Criterion.....

Question # “xx?”					
Judgement criteria	Indicators	Baseline	Information sources		Tools
			Primary	Secondary	

- The LogFrame should already include the indicators, which will be indicated here, if relevant
- The evaluators are free (and invited) to propose further indicators, and to challenge the LogFrame indicators, if needs be.

Evaluation matrix: how to read & check

Criterion.....

Question # "xxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxx?"					
Judgement criteria	Indicators	Baseline	Information sources		Tools
			Primary	Secondary	
					
					

- It allows to visualize, in a clear and schematic way, the triangulation of sources of information, the use of different tools and the balance between primary and secondary sources (*limitation of the risk of bias, appropriate choice of tools*).

Evaluation matrix: an example

Criterion: Effectiveness

Question # 8

“To what extent was the project effective in increasing by 15% the enrolment in primary school of girls in the province of X? What elements acted as facilitating and as contrasting factors to its results?”

Judgement criteria	Indicators	Baseline	Information sources		Tools
			Primary	Secondary	
Enrolment in province X (<i>project</i>) – <i>before/after</i>	# inscriptions	35% of target population		• Nat’l stats. • Local schools records	• Stat.analysis • Counterfactual analysis
Enrolment in provinces Y and Z (<i>no project</i>) – <i>before/after</i>	# inscriptions	To be determined		• Nat’l stats. • Local schools records	• Stat.analysis • Counterfactual analysis
Facilitating/contrasting factors	• Legal/regulatory changes • Social changes • Collab. families • Involvement in project	To be determined	Parents, teachers, pupils, media, local authorities, civil society	• Official Journal, archives MoE	• Regul.analysis • Focus Groups • Story telling sessions

Evaluation matrix: an example

Criterion: Relevance

Question # 8

“To what extent was the project addressing the needs of the beneficiaries and continued to do so during its implementation?”

Judgement criteria	Indicators	Baseline	Information sources		Tools
			Primary	Secondary	
• Relevance to beneficiaries (at design) • Mediation b/w diff. needs	• Identification beneficiaries • Involv. benef's (W+M) in planning	Not relevant	• Project beneficiaries • Project staff • Civil society	• Project records, reports	• Doc. analysis • Mapping potential beneficiaries • Focus Groups • F2f interviews
Relevance to beneficiaries (at implement.)	• Involv. benef's (W+M) in steering & monitoring	Not relevant	• Project beneficiaries • Project staff	• Project records, reports	• Doc. analysis • Focus Groups • F2f interviews
Capacity to adapt to changing needs	• Changing needs • Changes in plans, design	Not relevant	• Project beneficiaries • Project staff	• Project records, reports	• Doc. analysis • Focus Groups • F2f interviews

How to be ambitious in the quality of the evaluation design using an evaluation matrix?

Do you want to be ambitious ?

- Ask Framework Contractors to include a preliminary version of the Evaluation Matrix in their technical offer.
- Then, the matrix will be consolidated during Inception.
- This will allow you to better compare the different offers from a methodological perspective.

How to be ambitious in the quality of the evaluation design using an evaluation matrix?

Even more ambitious ?

- Ask your evaluators to add a last column at the time of the Final Report.
- It will be titled 'Reliability' and evaluators will have to attribute a score (ex. from 1 to 4) to each row.
- This will serve as a basis to discuss the limitations of the evaluation, which will go in the Final Report.

Many other international agencies made compulsory (or strongly advised) the use of an Evaluation Matrix. Click on logos for reading their guidance.



*See also the training
module 6 of IPDET*



Q&A session



**Open question & answer
session**



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