



EVALCRISIS

What
did we
learn?

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INTRODUCTION



INTRODUCTION



FOREWORD

Effective policies require relevant evaluation evidence based on robust methods and tools to learn what has worked, what did not work and why. The greater the complexity of the issues to be addressed by policies, the more acute the need to support policy making with sound evidence.

The Covid-19 crisis increased complexity in many policy areas. Since February 2020, unanticipated factors required our attention, and when access to the field became difficult, we realised that evaluation could not stop because it was 'difficult'. On the contrary, evaluation became even more important to inform policy and planning. Conducting evaluations in turbulent times require a great deal of flexibility; a challenge the entire development community has had to face. Learning from each other is essential. We wanted EvalCrisis to be a platform to share learnings during the Covid crisis with our colleagues in INTPA HQs and the EU Delegations, as well as with the wider evaluation community.

This paper presents some key lessons we learned since February 2020. We want them to be food for thought in further enhancing our capacity to improve evaluations and to inform better policies, even beyond the Covid-19 crisis.

Félix Fernández-Shaw
Director for Sustainable Development Policy and Coordination
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Listen to the podcast with
Mr. Fernández-Shaw:
[We cannot stop evaluation
now](#)

ABOUT THIS PAPER

The Covid-19 crisis changed the way evaluations are managed and conducted: difficulties in accessing respondents, adoption of measures to prevent disease transmission, additional methods to explain 'how change happens', application of 'Do No Harm' and 'Leave No One Behind' principles, management of remote or semi-remote evaluations, using innovative methods etc.

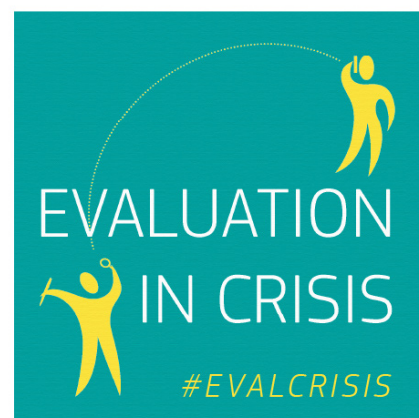
The EC DG INTPA/ESS Evaluation in Crisis (EvalCrisis) initiative was launched in April 2020 to learn about adaptive evaluation practices in a rather Hard-to-Reach world. EvalCrisis gathered and published a bibliography of evaluation resources throughout the crisis, alongside with the production of 22 audio podcasts, and 10 staff and guest blog posts.

EvalCrisis gained about 700 regular followers and is widely quoted in articles, books and conferences.

This lessons-learned paper focuses on six themes: (i) Fluidity of context, (ii) Ethics, (iii) Adaptive evaluations, (iv) Local evaluation skills, (v) Methods and tools, and (vi) Remote techniques. These themes are divided into topics which are described in one-page only with weblinks to relevant podcasts and blog posts, as well as further resources. Space and time prevented us from cross-referencing all third-party resources that we annotated and published. We warmly invite you to browse them on the EvalCrisis webpage.

We hope these lessons will help develop more sustainable, fair, rigorous, and inclusive evaluation practices.

Brussels, November 2021



The podcasts and blogs mentioned in this paper as well as all other resources can be accessed on the EvalCrisis website:
<https://europa.eu/capacity4dev/devco-ess/wiki/evalcrisis-home>.

ACKNOWLEDGEMENTS

Many evaluation experts and enthusiasts contributed to the EvalCrisis initiative. We would like to especially thank the 700 regular followers, who have been a big part of this Evaluation in Crisis journey throughout the Covid-19 crisis.

A particularly warm thanks goes to all the speakers of our podcasts and the authors of our blog posts; it has been a privilege and a pleasure to engage in discussion with them on themes of common interest. The section below shows, in alphabetic order, the list of all contributors. Additionally, we would like to express our appreciation for Sarah Davies, the voice behind the intro and outro of the podcast series.

The ESS EvalCrisis management and implementation team consisted of Marco Lorenzoni, Hur Hassnain, Michael Potar, and Saskia Brand.

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FLUIDITY OF CONTEXT



FLUIDITY OF CONTEXT



“Context matters. There can be no standardized, one-size-fits-all approach to evaluation”.

These words from Michael Patton are particularly relevant in complex, and/or unpredictable situations, such as what we have witnessed during the Covid-19 pandemic. In such fluid situations, evaluation needs to be developed, designed, implemented, adapted, presented, interpreted, and used with ‘fluidity of context’ in mind.

LAYERS OF FRAGILITY

The Covid-19 global pandemic has demonstrated how fragile we are, as individuals and as societies. It has inflicted some instability on all countries, but its impact is more acute in the quarter of the world that, according to World Bank figures, is marked by fragility, conflict, and violence. In this context, it is exacerbating pre-existing contextual, ethical, and practical challenges to evaluation.

What we learned from EvalCrisis

Contextual sensitivity and adaptability are starting points in tackling the impact of multiple layers of fragility in evaluations. Understanding the context is very important as lessons, evaluation methods and tools from stable contexts cannot always be applied to moving and unpredictable environments. Rather, the evaluation team and evaluation commissioners should co-design the evaluation methods and tools whilst keeping in mind key health-related, cultural, social, economic, and political factors, as well as the key factors and actors of instability and their interplay.

IMPORTANCE IN CRISIS SITUATIONS

To better assess ‘what has changed’ and ‘why’, including the un/intended consequences coming from uncertain, complex, fluid and sometimes volatile contexts, more focused attention is required by evaluators. These situations require the use of more contextually sensitive indicators, methods, and tools for measuring change without causing harm to affected populations.

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[Andre Kahlmeyer](#) - Contextualising sensitivity and fragility

[Margie Buchanan-Smith](#) - Do less, but do it really well

[Francois Dupaquier](#) - Evaluation in war zones

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DEALING WITH FCV

Calamities, such as global pandemics, disproportionately impact areas or communities that are already in situations of fragility, conflict, and violence. Dealing with evaluations in such settings requires extra skills (e.g., the use of conflict-sensitivity, applying Do No Harm principles throughout the evaluation cycle and adopting extra security measures), more resources and extra time to systematically assess the relationship between the context and the intervention and vice versa.

What we learned from EvalCrisis

Unfortunately, time, skills and resources are elements that are often unavailable in such extremely complex contexts. [Gaining a better understanding](#) of the situation on-the-ground through conducting a thorough conflict analysis and working closely with local partners has proven to be helpful when working in fragile contexts. Face-to-face conversations are among the best ways to gather data. Meeting respondents directly and spending time with them (often over cups of tea) can help to develop trust and, in turn, increase the reliability of the resulting data. This helps evaluators to better understand and unfold the different layers of fragility, including those induced by crises.

Working closely with local partners helps to ensure sufficient knowledge of the local systems, culture, and norms, as well as preventing risks of harm for people, communities, and organisations.

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[Andre Kahlmeyer](#) - Contextualising sensitivity and fragility

[Stefanie Krapp & Antonina Rishko-Porcescu](#) - Evaluation hackathon (IPDET)

EVALUATING THE FUTURE

Evaluations are often backwards-looking exercises. Regardless of the stage at which they are commissioned (ex-ante, mid-term, ex-post, strategic), they tend to look at what types of actions and results were intended, whether such actions were delivered and if expected results and long-term impacts were achieved.

What we learned from EvalCrisis

While predicting future events will always remain a challenging task, the good news is that there are a range of tools at our disposal to ensure we are prepared for possible 'alternative futures'.

Dynamic models, for example, could be used to assess the logic of interventions during an evaluation exercise, as a stress-test for

IMPORTANCE IN CRISIS SITUATIONS

Evaluations must support policies and programmes to adapt to complex, uncertain and risky futures. To do so, it is essential to provide truly forward-looking insights.

unintended consequences that may arise. Participatory scenario planning techniques are also very effective methods to engage a wide range of stakeholders while running an evaluation assignment. They offer a means of identifying possible alternative outcomes for the planned interventions, as well as discussing how future changes in the socio-economic, political, and environmental contexts may affect the results and impacts of contemporary actions.

In an increasingly uncertain global context, evaluations should enable policymakers to address future challenges by informing policies and projects today.

DISCOVER MORE



[Rick Davies](#) - Evaluating the future



[Blog 3:](#) Evaluating the future
[Blog 5:](#) Five steps to measuring unintended effects of development interventions

BREAKING BARRIERS

There is a significant unmet need and demand from the developing world to address weaknesses in evaluation capacities and systems, and to strengthen the relationship between evidence and improved decision making. To achieve the SDGs, there is a dire need to align resources to improve evaluation capacity across borders.

What we learned from EvalCrisis

Lessons learnt from initiatives taken by different evaluation associations in past years, show that there is a huge need to promote the use of evaluative evidence to inform public policy, as well as a real necessity to strengthen evaluation systems to deliver that evidence.

Several high-level global initiatives support the building of local evaluation systems and delivery, as well as building inclusive partnerships of actors, stakeholders and donors committed to development evaluation. Among them, the [Global Evaluation Initiative](#), the [International Organisation for Cooperation in Evaluation](#), the [International Evaluation Academy](#) and the [International Development Evaluation Association](#), all focus on building an eco-system of support at the local and regional levels and on closing M&E gaps across borders.

IMPORTANCE IN CRISIS SITUATIONS

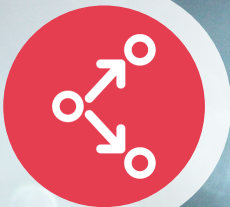
In crisis situations, the evaluation community would benefit from improved dialogue amongst professions to increase the capacity to build knowledge and share lessons with social scientists, national statistical offices, academia, think tanks, civil society organisations etc.

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[University of California](#) - Relationship is everything
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[Megan Kennedy-Chouane](#) - Recycle-reuse-reduce

ETHICS





Prolonged crises have an impact on vulnerability, and this is particularly acute in fragile contexts.

In-person meetings as well as the gathering and temporary storage of data and evidence may create risks related to security, safety, health, livelihoods and reputation of individuals and communities. Therefore, the evaluation will be subject to intricate ethical choices.

REVISITING ETHICS AND RISKS

The respect of ethical principles (for example, Honesty and Transparency, Respect for Human Rights, Respect for Dignity and Diversity, Do No Harm, Impartiality) is essential to the integrity and professionalism of evaluation. Learning from the experience of the humanitarian world is an important resource for evaluators.

What we learned from EvalCrisis

The application of the ethical principles requires an accurate analysis of the implications of our methodologies in non-conventional settings where new risks emerge. For instance, during the Covid crisis the respect of Do No Harm implied new conditions such as respecting social distancing; impartiality is compromised if crucial informants are excluded from remote evaluations because they do not have access to phones or internet, or are not allowed to respond to evaluators freely and autonomously etc.

In some cases, evaluators may not be able to find conclusive evidence to respond to all points of their mandate because of a low risk/reward ratio. Therefore, it is important that their reports be clear about the limits of the methodology and the validity of findings. In these cases, generalisations are to be avoided.

IMPORTANCE IN CRISIS SITUATIONS

Global crises increase fragility, and, in these contexts, we need to understand what the ethical principles mean and imply, and to revisit their formulation, if necessary. It is in these situations where the need to use these principles as a compass to guide evaluation work is crucial.

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[Blog 4](#): Mitigating the risks of remote data collection

INVESTING IN LEARNING

Evaluations are about learning and accountability. However, during Covid crisis, the learning side of the spectrum was emphasised more for rapid course correction, sharing the dos and don'ts in policy and programming and future planning. Evaluators and their collaborators had to quickly adapt their methods to the new reality, both in terms of technical mastering of new tools and techniques, and of understanding of the consequences of their use in terms of validity and robustness of findings. This led to a lot of learning through trial and error, particularly in the cases of using remote evaluation techniques for evaluations.

What we learned from EvalCrisis

Evaluation commissioners (even institutions that were traditionally reluctant to accept the use of remote evaluations) quickly realised that - when presential evaluation is impossible - the use of remote techniques and a better use of existing evidence can be viable complements or alternatives to presential evaluation, with the caveat that a 'fully virtual' approach would carry inherent dangers.

After all, if evaluation is about learning we cannot take the risk of excluding from the community of learning those partners that cannot participate in remote evaluations.

The network dimension of the evaluation community has proven to be essential. Different organisations and networks provide several platforms for exchanges of experiences and for the development of original tools, methods and solutions (see on the latter point the results of the [Evaluation Hackaton 2020](#)).

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[Margie Buchanan-Smith](#) - Do less, but do it really well
[Abeer Hakouz](#) - Learning by doing
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[Blog 4](#): Mitigating the risks of remote data collection
[Blog 10](#): Growing as a field

GREENING EVALUATION

When reading evaluation Terms of Reference through a “green lens”, we realise that most of them were written without environmental sustainability in mind; the provision for the use of existing secondary sources is often limited and the ToR imply several international travels.

What we learned from EvalCrisis

The merits and limitations of these methods are discussed in further chapters of this paper. We mention the investments made by different agencies and the civil society in making better use of relevant secondary sources, decreasing the need for repeating primary research; the increased use of local evaluation skills; the use of remote or semi-remote evaluation methods; and the use of remote meeting tools.

All these methods contribute to reducing CO2 emissions by cutting international flights – even if this was not their primary objective. The analysis and awareness of these unplanned, positive environmental effects is an excellent opportunity to move towards greener evaluation practices in the post-Covid era, thus contributing to the ambitious objectives of the [European Green Deal](#).

IMPORTANCE IN CRISIS SITUATIONS

Due to the travel restrictions following the Covid crisis, the evaluation community had to quickly adapt its own practices by embracing or consolidating methods and tools that some pioneers had already started to explore a few years ago in [Hard-to-Reach Areas](#).

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[Margie Buchanan-Smith](#) - Do less, but do it really well

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ADAPTIVE EVALUATIONS



ADAPTIVE EVALUATIONS



Evaluators are often asked to intervene in situations where contexts change frequently and sometimes unexpectedly.

This is particularly true in fragile settings and during regional and global crises, which call for a high level of flexibility and have repercussions both in terms of programming and execution.

Both commissioners of the evaluations and evaluators have a key role to play.

BEING FLEXIBLE

In situations of global crisis, such as the COVID-19 pandemic, and in hard-to-reach areas, flexibility plays a key role throughout the evaluation cycle – from designing evaluation to disseminating and using the results. When the context changes rapidly, the evaluation may need to be prepared to adapt accordingly, in terms of its subject, methods and tools to provide a better idea of what is changing and why.

What we learned from EvalCrisis

Tackling complexity is a challenge for almost all evaluation exercises. This complexity is not very well reflected in bloated and rusty results frameworks and indicators, and most evaluation designs use rather linear and simple designs that are not fit for purpose for such changing and sometimes volatile contexts. In such situations, there is a need for showing flexibility in what is to be measured and how, without compromising on the robustness of evaluation methods and tools.

It is good to aim for ‘gold standards’, such as a large sample size, or identifying comparison groups in evaluation, but one should acknowledge that there is a trade-off between robustness of data and no data at all. In crises, it is advisable to invest in good enough data rather than delaying for better data.

IMPORTANCE IN CRISIS SITUATIONS

For evaluation commissioners and programme designers, evaluations in contexts of crisis are opportunities to replace results or indicators reflected in outdated Intervention Logics/ Theories of Change with more realistic ones.

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[Blog 1](#): Embracing the Pandemic

BRINGING MORE FOCUS

Focusing an evaluation exercise on a limited number of questions and a feasible scope will result in more robust data gathering and analysis. It helps evaluators to dig deep into 'how change happened' in a given context rather than just scratching the surface with a long list of evaluation questions and partially answered criteria.

What we learned from EvalCrisis

Crises affect countries in different manners and speeds, often adding to existing conditions of inequality and unsustainability. In such situations, for an evaluation to identify the most meaningful changes that took place, it needs to remain focused on what is 'needed to know', rather than what is 'good to know'. This can be achieved by prioritising a limited number of questions under the evaluation criteria that are needed to be assessed. There may be information already available on some criteria/questions from previous evaluation exercises that just need more thorough investigation. This also helps avoid research/evaluation fatigue.

IMPORTANCE IN CRISIS SITUATIONS

Bringing focus is particularly important in evaluations in situations of crisis, as evaluators need more time to understand the relationship between causes and effects in a complex environment.

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[Blog 1](#): Embracing the Pandemic

CONTINUOUS COORDINATION

Continuous coordination between evaluation commissioners and evaluators is of the utmost importance to guarantee that evaluations respond in an appropriate way to well-defined needs.

What we learned from EvalCrisis

Coordination is essential to ensure that the two parties are aligned at all stages of the evaluation design and conduction, and in case of replanning, as the Covid crisis taught us.

Furthermore, evaluators must strive to address the learning needs of the commissioning institution to make their findings and recommendations fully actionable, and to tailor final messages to decision makers for a full uptake of results.

The identification of relevant stakeholders is as important as the proper framing of messages and the choice of channels. A careful analysis of internal audiences and stakeholders to communicate with final evaluations messages should therefore be provided to evaluators from an early evaluation stage .

Evaluators should ensure to distil findings and recommendations in a way that is meaningful and helpful for the intended end-users.

IMPORTANCE IN CRISIS SITUATIONS

This is even truer in contexts of global crisis, where the need to understand the results of interventions and their determining factors increase and the number of evaluations being commissioned decreases.

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LOCAL EVALUATION SKILLS



LOCAL EVALUATION SKILLS



Working with local partners, evaluators and enumerators can have several advantages in terms of access to communities and information; this is even more true in situations of crisis. However, risks linked with difficult contexts shall not be underestimated and need to be addressed in the evaluation design and implementation throughout until its dissemination phase.

ENGAGING LOCAL EVALUATORS

While an increasing reliance on local evaluators has emerged in contexts of global crises, their involvement has the potential to strengthen evaluations in ‘normal’ conditions too, but to do so would require addressing persisting challenges.

What we learned from EvalCrisis

Local evaluators (senior, young and emerging) provide great value in accessing local insights and knowledge due to their first-hand understanding of local contexts. They can add value in the collection and review of local data and keep-up engagement with local stakeholders in critical conditions. They do so either directly or by intermediating remote tools used by international teams. Often, local partners also ensure a better management of the security aspects for their involved experts.

A strong reliance on local evaluators in some contexts can be challenging due to a range of critical aspects, including logistics and management complexity as well as a limited pool of resources to choose from. This is certainly an area requiring greater investment and experimentation in the future – including through improved national evaluation training capacities globally; from this perspective, initiatives such as the [Global Evaluation Initiative](#), [EvalYouth](#) and [EvalIndigenous](#), provide excellent opportunities for professionalisation and networking.

IMPORTANCE IN CRISIS SITUATIONS

The inclusion of local evaluators allows international teams to access relevant knowledge and information in critical or inaccessible areas.

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[Blog 4:](#) Mitigating the risks of remote data collection

LOCALLY LED FEEDBACK

In situations of crisis, local feedback is important for real-time course correction, monitoring and evaluation. It helps local people engage with interventions and become change-agents in their respective communities rather than just recipients of programmes designed by others, often foreigners.

What we learned from EvalCrisis

There are multiple ways in which evaluations can incorporate locally led feedback mechanisms. When face-to-face meetings with participants and non-participants are impossible, people can be given the option to provide feedback via a feedback box, text messages, a confidential phoneline, email etc. It is particularly useful to organise a validation and dissemination workshop at community level to make sense of the data gathered, especially if the outcomes are difficult to understand.

IMPORTANCE IN CRISIS SITUATIONS

Locally led feedback mechanisms can help instantaneous monitoring of the situation and inform evaluators and programme staff on areas requiring attention. They can articulate what is changing and what should be avoided to do no harm in situations that are already affected by crisis. Having an effective feedback mechanism is one of the nine Core Humanitarian Standards; created to ensure that timely and effective support is provided by national and international development partners.

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[University of California](#) - Relationship is everything



[Blog 9:](#) Disseminate till you drop!

STRENGTHENING CAPACITY

Global lockdown measures and restricted travel have had a big impact on the selection of evaluation methods and especially collection of primary data. When international travel is not possible, there is greater

reliance on local evaluation expertise. Thus, the hybrid model of working across borders for evaluation became unavoidable. On a positive note, the engagement of local evaluators and enumerators helps international experts to better understand the causes and effects of a problem on the ground, gather quality data on such issues, conduct a more thorough analysis and present the findings back to the respective communities.

IMPORTANCE IN CRISIS SITUATIONS

Ensuring that local evaluators and enumerators have the necessary evaluation competencies and training is key to a successful evaluation.

What we learned from EvalCrisis

Many bilateral/multi-lateral aid agencies and civil society organisations now better realise the power of building local M&E capacities and have included this in their strategies and planning. There is also great support being provided to the national and regional voluntary organisations for the professionalization of evaluation to build these capacities locally. We learnt from this global crisis that in the long run investment in local capacity will lead to evaluation exercises that depend less on international support and are also more sustainable and environmentally friendly as a result of a reduced requirement for international travel.

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-

METHODS AND TOOLS



METHODS AND TOOLS



In a fluid, complex and unpredictable environment, such as communities affected by a health pandemic, or fragility and conflict, there may be no pre-established theories of change or reliable evidence on ‘how change happens’.

This may make it hard to define clear evaluation questions and subsequently select an appropriate design to help evaluators tailor methods and tools.

THEORY OF (NO) CHANGE

Understanding complexity has always been a challenge for evaluators, who are often called to evaluate interventions based on linear and simplistic Theories of Change or Logics of Intervention.

What we learned from EvalCrisis

Theories of Change (or of No Change) often represent an ideal and optimistic view of the changes that donors want to achieve and are sometimes based on what happened in the past on similar interventions. But economic, social and political conditions are different, with even the more consolidated interventions unfolding differently when replicated in a new context. Also, even the simplest of projects can have hundreds of stakeholders and partners, all interacting in different ways, thus impacting in different manners on the interventions’ chances of success.

The reconstruction of the Intervention Logic, which is a key step in the evaluation design, aims at reconsidering the original design in light of the situation in the field and its evolution.

This process is made even more complex in crisis situations, where different “turbulence factors” (more numerous than in a stable environment, often unexpected, frequent, and sometimes violent) impact on the chances of success of the intervention. However, the accuracy of this process is essential as it will have an impact on the design of the evaluation and the choices of methods and tools.

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[Blog 3:](#) Evaluating the future
[Blog 5:](#) Five steps to measuring unintended effects of development interventions

QUANT VS QUAL

The integration of quantitative and qualitative analysis in evaluation is strongly advisable to understand not only what changes have been achieved, but also why they have been achieved and what have been their determining factors and impediments.

What we learned from EvalCrisis

The utilisation of remote evaluation techniques and the increasing use of big data (which are some of the methodological changes accelerated by the Covid crisis) bring with them enormous advantages, but also the risk of prioritising quantitative over qualitative analysis.

The use of big data is fast and relatively cheap and allows for the coverage of entire populations, but data are essentially quantitative; they tell us what happens but rarely analyse the reasons why it happens. Similarly, the difficulty of gaining respondents' trust during remote interviews may push evaluators to use purely quantitative surveys, which require a lower level of trust.

It is important for both evaluators and commissioners to be aware of these risks and to counterbalance them with relevant qualitative analysis. Commissioners should also be aware that the use of qualitative analysis requires evaluators with specific and uncommon skills, particularly in contexts of difficult field access and when face-to-face contacts are not possible.

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PRIORITISING PARTICIPATION

Among the advantages of participatory evaluation tools, we underline that they often achieve a better perspective of the needs of beneficiaries and of the changes that happened, improve access to evidence that could not be gathered otherwise, form a better understanding of the reasons an intervention works or does not work and provide an easier identification of unintended effects.

What we learned from EvalCrisis

Evaluators should aim to quickly build trust with a wide range of informed parties, which is often a challenge. If trust is not gained, interviewees rarely disclose their opinions and experiences in a candid and open way, thus impacting the quality of evidence. Gaining trust during remote interviews is even more difficult as the media that are used to communicate may act as barriers to human interaction. In these circumstances, the involvement of partners and beneficiaries in the design of the evaluation and its conduction with the use of [participatory](#), [non-extractive](#) and [goal-free](#) techniques can be of a great help.

But the use of these methods is more time-consuming than traditional techniques and requires accurate preparation and training of local partners which must be factored-in when designing an evaluation.

IMPORTANCE IN CRISIS SITUATIONS

These advantages have an even higher value in crises, as travel restrictions call for alternative ways of gathering evidence, and this can be done through participatory methods.

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REMOTE TECHNIQUES



REMOTE TECHNIQUES



In pandemics and fragile situations, gathering evidence during in-person meetings is often difficult. Remote evaluation techniques, often ICT-based solutions, offer a convenient way to reach evaluation respondents without being exposed to potentially risky situations.

Caution! New technologies may pose unprecedented risks to individuals and data validity!¹

REMOTE SENSING

During a pandemic, war, or natural disaster, the effectiveness of interventions is difficult to evaluate. In such situations, the use of satellite data can be used to gather, show and analyse imagery and data of certain geographical areas from space observations to identify outputs, outcomes, and impact.

What we learned from EvalCrisis

The first step to using remote sensing is to ask whether the evaluation involves looking at changes that can be analysed through satellite data. Along with assessing the suitability of using remotely sensed data, the evaluation team must identify the relevant satellite-based indicators or proxy indicators for capturing change. These will help to estimate costs and to make decisions about the products to be used, which may be free or commercially available. It must be noted that all this requires additional skills and experience sets, which are to be factored in when designing evaluations.

IMPORTANCE IN CRISIS SITUATIONS

Satellite remote sensing derived indicators and proxy indicators are useful in collecting time-series data on land cover changes, water quality and quantity, natural disaster, crop detection, agricultural yield estimation, pollution levels, economic activities, urbanization, tracking illegal activities and even migration. It provides objective evidence on the how and where; however, for causal and explanatory information (the 'why'), findings should be triangulated with other sources of information, such as field verification, key informant interviews etc.

¹ Similar reflections are discussed also in the final paper of the initiative "[Evaluation in Hard-to-Reach Areas](#)".

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PHONE-BASED FEEDBACK

Mobile-phone-based tools offer a convenient way to reach stakeholders when access to the field is limited. SMS-based surveys and voice calls do not require users to possess the latest smartphone; however, smartphones offer additional possibilities based on messaging apps or web-based forms.

What we learned from EvalCrisis

The advantages increase with the performance of the phone. However, the availability of internet access and the cost of data traffic for users must be taken into consideration before embarking on data-consuming surveys. In these cases, SMS-based surveys may be an alternative, but they are mainly suitable for closed-ended questions. Phone calls are used in many contexts but require organisation through call centres. When conditions allow the use of messaging apps, their choice is to be made against their popularity and lawfulness, data security and confidentiality. The implementation of mobile-based surveys has low costs, but a key factor must be considered: are phone numbers of target interviewees available and usable without putting the respondents at risk?

The use of these mechanisms can introduce elements of bias; mobile phones may not be used in some communities; women may be prevented to use them (gender bias) and illiteracy bias can represent a further issue.

Finally, the spreading of illicit spam and fishing techniques via phone is a further factor to be considered and addressed to reduce the impact on response rate.

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FIELD-BASED SURVEYS

Using local researchers in data gathering is not new. It is a cost-effective way of conducting surveys and is common in situations of difficult access to the field, conflict and violence. Partners living in target areas have greater access to local communities than “foreigners”. Being known, understanding and respecting the local customs, minimising the travel, having a better knowledge of the security conditions and speaking the local languages are some of the winning factors of this method.

What we learned from EvalCrisis

Finding the right local partners takes time, implies an accurate process of selection based on skills and experience and involves some investments. Training, tutoring and monitoring of the enumerators are essential and time-consuming tasks to be factored-in in the evaluation design.

But evaluators and commissioners must not close their eyes. Using local researchers in situations of crisis implies a transfer of risk on them and this transfer of risk (security and/or health-related) is to be assessed, managed and accurately weighed against the advantages of the mission.

Evaluations shall not put at risk anybody’s life and integrity!

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ONLINE INTERVIEWS

The global pandemic has allowed remote meeting tools to flourish: [GoToMeeting](#), [Skype](#), [MS Teams](#), [Webex](#), [Zoom](#), [BlueJeans](#), [Google Chat](#), and others.

What we learned from EvalCrisis

Although their use in evaluation is certainly innovative, the drawbacks of such tools should not be underestimated. The first of these backlashes is infrastructural. The digital divide still exists, and in countries with a low internet penetration rate or with bandwidth problems, these tools are of very little help.

IMPORTANCE IN CRISIS SITUATIONS

When pandemics strike, the possibility to rely on local researchers becomes a crucial factor in stable areas also.

IMPORTANCE IN CRISIS SITUATIONS

In contexts where it is impossible to interact face-to-face with local stakeholders, remote tools are widely used to conduct individual or group interviews, thus helping evaluators to engage with them.

Other issues can be a limited access to vulnerable stakeholders (elders, women, persons in situations of poverty and marginalized persons, etc.) and the difficulty for evaluators to quickly establish trust with interviewees.

The possibility of remotely interviewing stakeholders can generate a false trust, in that we may have the impression of having reached people that we could hardly have reached in presence (women, minority leaders...), but we will never know if the person interviewed was free to speak to us or if their statements were controlled by someone sitting on the other side of the screen.

All these issues would impact on the validity of evidence. During evaluation design evaluators are responsible for a thorough assessment of such limitations and the implementation of mitigation measures.

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I.T.-BASED TOOLS

The limitations to travel contributed to the spread and use of specialized ICT tools and their number is increasing by the day.

What we learned from EvalCrisis

In some cases, tools created for different purposes are used to serve the needs of remote evaluations. It is the case for [Mural](#) and [Sprockler](#), used for remote [Outcome Harvesting](#) sessions; during evaluation design (Mural); to support [Storytelling](#) methods (Sprinckler, [SenseMaker](#)); and for [Tableau](#), used in [Outcome Mapping](#). Similarly, evaluators started using online meeting tools also for [Focus Group](#) discussions.

A further interesting case is [Parevo](#) (a web-based scenario planning tool), whose use in evaluation is being explored as a possible alternative to the [Delphi](#) method, which is now supported by tools such as [Welphi](#), [Mesydel](#) or [eDelphi](#).

To support field surveys both development and humanitarian evaluators use tools allowing offline data collection and online processing such as [KoBoToolbox](#), [SurveyCTO](#), [Zonka](#), [SurveySparrow](#) and, recently, [SurveyMonkey's Anywhere](#).

In all cases, when using ICT tools, evaluators must be aware of their direct (bias, self-selection of participants, exclusion of people with no access to ICT...) and indirect risks (by using ICT tools, enumerators increase their visibility, and this can have an impact on security) as to adopt consequent mitigating measures.

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SOCIAL MEDIA ANALYSIS

Social media analysis can contribute to evaluations in many ways, but, when used, evaluators and evaluation commissioners should know that opinions and views on social media tend to be extreme, represent only users of the media themselves and do not necessarily reflect the sentiment of the 'silent majority' or large parts of the population.

What we learned from EvalCrisis

In many contexts, this 'silent majority' includes the most vulnerable, such as women, children and elderly. Use of social media is furthermore determined by the possibility to access the internet by the target population, because of both infrastructural elements and cultural barriers.

In a situation of crisis, where it is not always possible to have face-to-face consultations, data can be gathered remotely through monitoring social media platforms such as, Twitter, Facebook, Instagram, Tik Tok etc., or by conducting a robust [Social Network Analysis](#).

As examples, [Twitter](#) data can be used in terms of sentiment analysis, key phrase extraction and social network analysis of tweets. Similarly, the possibility for [Facebook](#) users to form private and public groups and to develop surveys can help in gathering data as well as in analysis, phrase extraction and network analysis of posts and trends.

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BETTER USE OF EVIDENCE

During 2020, development donors experienced a dramatic drop in the ratio of “planned versus conducted evaluations”; a direct consequence of the travel limitations following the Covid crisis. To partly compensate for this, and to maintain a sound evidence base for decision makers, some institutions increased their efforts in making better use of existing secondary sources; this involves the integration of multiple data sources (big data) which are processed through Artificial Intelligence systems.

What we learned from EvalCrisis

Some of these initiatives are mostly internal; in other cases, these initiatives are public and offer meta-analyses of findings from previous evaluations. We mention: “[Reflections, lessons from the past](#)”, a series of thematic studies from the UNDP Independent Evaluation Office; “[Lessons for Covid-19](#)” of the Independent Evaluation Office of the GEF; and the “[IEG Lesson Library](#)”, an initiative of the WB Group’s Independent Evaluation Group.

While the above initiatives were drawn from our own evaluations of these organisations, the OECD-DAC promoted the Covid-19 Global Evaluation Coalition, a collaborative project made up of development evaluation units from different DAC members. The Coalition publishes “[Lessons from the Coalition](#)”, a series of syntheses of thematic evaluation evidence produced by the members.

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BIG DATA AND AI

Use of big data and their processing through AI systems are driving innovation globally and are also becoming assets for evaluations.

What we learned from EvalCrisis

The use of AI and machine learning in analysing big data allows us to manage very large data samples and series in a short period of time, thus helping understand complex changes in local or global dynamics.

Importantly, big data and AI are predominantly quantitative and not an alternative to qualitative analysis and face-to-face interactions.

Some challenges to be considered by evaluation commissioners include the need for a wide set of new skills in data analysis and processing (impacting on budget of evaluations) and for the prior assessment of the reliability of data to avoid biases in the final analysis. Costs of such technologies may create distortions in the market, as only some experts and companies may have the capacity to access these technologies.

Finally, reliance on remote data may erode trust with local communities, an element which remains essential for successful evaluations.

IMPORTANCE IN CRISIS SITUATIONS

The processing of large amounts of digitalised data from different sources (i.e., census data to satellite imagery, phone to internet usage, travel paths to use of commodities etc.), allow the comprehension of changes achieved, even in critical or inaccessible areas or during large crises, and is becoming a pivotal component of robust evaluations.

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