



SESSION 5

Evaluation matrix

Case Study 2: checking the evaluation matrix at inception

Exercise:

Formulation of the Evaluation Questions

Let's practice !

Mentimeter on evaluation question:
correct or poor formulation?

Evaluation Matrix

EQ1: "XX?"				
Evaluation criteria covered				
Judgement criteria (JC)	Indicators (Ind)	Information sources		Methods / tools
		Primary	Secondary	
JC 1.1 -	I 1.1.1 -			
	I 1.1.2 -			
	I 1.1.3 -			
JC 1.2 -	I 1.2.1 -			
	I 1.2.2 -			
	I 1.2.3 -			
JC 1.3 -	I 1.3.1 -			
	I 1.3.2 -			
	I 1.3.3 -			

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



Evaluation matrix, key structuring tool



Overview in a key tool: the evaluation matrix

Evaluation criteria

Evaluation question 1

Judgement
criterion 1.1

Judgement criterion 1.2

Indicator
1.1.1

Indicator
1.1.2

Indicator
1.2.1

Indicator
1.2.2

Indicator
1.2.3

- ✓ Helps evaluators structure their methodology
- ✓ Schematic, clear, simple to read
- ✓ Specific to a given question (horizontal reading)
- ✓ Shows how evaluation criteria are covered (vertical reading)

Evaluation matrix: Basic structure

PART A – Evaluation design

What evaluation criterion/criteria is/are addressed by this EQ?

EQ1: "XXX?"				
Evaluation criteria covered				
Judgement criteria (JC)	Indicators (Ind)	Information sources		Methods / tools
		Primary	Secondary	
JC 1.1 -	I 1.1.1 -			
	I 1.1.2 -			
	I 1.1.3 -			
JC 1.2 -	I 1.2.1 -			
	I 1.2.2 -			
	I 1.2.3 -			
JC 1.3 -	I 1.3.1 -			
	I 1.3.2 -			
	I 1.3.3 -			

The first numeric value represents the EQ the JC refers to.

The two first numeric values represent the JC the indicators refer to.

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

PART A – Evidence Log

EQ1: "XX?"				
Evaluation criteria covered				
Judgement criteria (JC)	Indicators (Ind)	Information sources		Methods / tools
		Primary	Secondary	
JC 1.1 -	I 1.1.1 -			
	I 1.1.2 -			
	I 1.1.3 -			
JC 1.2 -	I 1.2.1 -			
	I 1.2.2 -			
	I 1.2.3 -			
JC 1.3 -	I 1.3.1 -			
	I 1.3.2 -			
	I 1.3.3 -			

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: Basic structure

PART B – Evidence Log

Ind	Baseline data	Evidence gathered/analysed	Quality of evidence
I 1.1.1			
I 1.1.2			
I 1.1.3			
I 1.2.1			
I 1.2.2			
I 1.3.1			

¹ Use the same numbering as in Part A; no need to describe the indicators.

² In case they are available. This column can also be used to record mid-term data (if available).

³ Score as follows: 0 (no evidence), 1 (some evidence), 2 (sufficient evidence), 3 (conclusive evidence)

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		<ul style="list-style-type: none"> Nat’l stats. Local schools records 	<ul style="list-style-type: none"> Stat.analysis Counterfactual analysis
Enrolment in provinces Y and Z (<i>no project</i>) – <i>before/after</i>	# inscriptions	To be determined		<ul style="list-style-type: none"> Nat’l stats. Local schools records 	<ul style="list-style-type: none"> Stat.analysis Counterfactual analysis
Facilitating/contrasting factors	<ul style="list-style-type: none"> Legal/regulatory changes Social changes Collab. families Involvement in project 	To be determined	Parents, teachers, pupils, media, local authorities, civil society	<ul style="list-style-type: none"> Official Journal, archives MoE 	<ul style="list-style-type: none"> 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	
<ul style="list-style-type: none"> • Relevance to beneficiaries (at design) • Mediation b/w diff. needs 	<ul style="list-style-type: none"> • Identification beneficiaries • Involv. benef's (W+M) in planning 	Not relevant	<ul style="list-style-type: none"> • Project beneficiaries • Project staff • Civil society 	<ul style="list-style-type: none"> • Project records, reports 	<ul style="list-style-type: none"> • Doc. analysis • Mapping potential beneficiaries • Focus Groups • F2f interviews
Relevance to beneficiaries (at implement.)	<ul style="list-style-type: none"> • Involv. benef's (W+M) in steering & monitoring 	Not relevant	<ul style="list-style-type: none"> • Project beneficiaries • Project staff 	<ul style="list-style-type: none"> • Project records, reports 	<ul style="list-style-type: none"> • Doc. analysis • Focus Groups • F2f interviews
Capacity to adapt to changing needs	<ul style="list-style-type: none"> • Changing needs • Changes in plans, design 	Not relevant	<ul style="list-style-type: none"> • Project beneficiaries • Project staff 	<ul style="list-style-type: none"> • Project records, reports 	<ul style="list-style-type: none"> • Doc. analysis • Focus Groups • F2f interviews

Using an evaluation matrix to assess the evaluation design

Do you want to be ambitious ?

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

Using an evaluation matrix to assess the quality of the evaluation conclusions?

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*





Case Study 2

Evaluation Matrix

Assess the quality of an evaluation matrix

Discuss with your group the evaluation matrix you received and critically analyse its quality as it is requested to do before validating the inception report sent by your evaluation team.



Tips on key aspects to look at:

- ✓ The evaluation questions adequacy to the evaluation objectives and uses
- ✓ The evaluation questions formulation
- ✓ The link between evaluation questions, judgment criteria & evaluation indicators
- ✓ The coherence of the sources of information



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