

Commissioning evaluation: using Preparation and Procurement to realise the Power of your Evaluation



Michelle Hollier (nee McGuire), Winning Moves Ltd | T: +44(0)121 285 3800 | E: michelleh@winningmoves.com

Building on our last paper ‘*The Power of Evaluation*’, we now move forward to advice on procuring an evaluation. This paper identifies good practice, to avoid the pitfalls, in commissioning evaluation.

So, you are an Evaluation Believer. You understand that evaluation has the power to improve programme performance. That it has the power to help programme managers learn. And that evaluation allows the lessons learned from one generation of programmes to help improve the next generation. All you need now is to plan your evaluation...

Internal or external? That is the question...

Firstly, you should consider whether it is best to use your internally available skills and resources, or to commission an external consultancy? There is no right or wrong answer. And sometimes a blended approach can be most effective. The best solution will depend upon the programme itself, and your evaluation requirements. Considerations include:

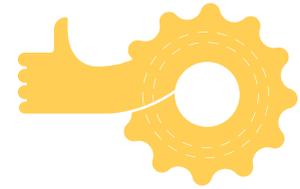
- Do you have the time, expertise and capacity internally?
- Are there data gaps that you need help to overcome?
- Is independence or external credibility important?
- What would be proportionate to the programme itself (e.g. time, value, complexity)?

The remainder of this paper focuses on commissioning an external evaluator to provide additional skills, capacity or to bring an independent view.



Good practice in commissioning evaluations

Good practice matters. And as with a lot of things, preparation is key. And good preparation, prior to commissioning ultimately underpins deriving optimum learning from your evaluation; ensuring findings are accessible, actionable and value adding.



As far as possible, try to consider evaluation early on in the life of the programme cycle. *This includes:*

- Developing the programme logic. The programme logic describes how the programme is intended to work. Expressed as a narrative or a flow diagram it sets out what a programme aims to achieve (outputs, outcomes and impacts) and how it will do it (inputs and activities). This roadmap becomes an effective tool to communicate to others, and to outline the things that should be measured through an evaluation.
- Thinking through evaluation questions. The programme logic provides a description of the programme and its intended outcomes that will help shape high level evaluation questions. These should reflect the purpose of the evaluation, for example understanding the difference the programme has made, or understanding what is working.
- Putting the data collection framework in place. The programme logic also provides a framework for your data needs. For example, changes in GVA or employment. Ideally, programme design should consider evaluation, so that appropriate methods of collection of programme data can be put in place from the outset.

Allocating an evaluation budget.

When allocating or securing a budget for your evaluation, the importance and/or complexity of the programme, levels of existing knowledge and/or data and the decisions to which the evaluation will contribute are all important factors to consider. The amount of budget available might impact on the level of rigor, scope or evaluation design.

Have a clear and specific purpose for the evaluation.

Programme evaluation is a key tool to support evidence based policy making and programme development. Evaluations should be timely to support and influence decision making and evaluation objectives clearly stated and agreed. This includes the decisions it will inform and wider context in which it is happening. Expectations should also be realistic (e.g. in line with scope and budget).

Engage all relevant stakeholders in planning for the evaluation as early as possible.

An important step in achieving buy-in for, and supporting delivery of, the evaluation which also helps to ensure findings and learnings are taken on board and embedded. This could be achieved by the formation of a stakeholder, or steering group. The group could feed in to the evaluation questions and any specification for external contractors, be updated on the evaluation progress, consider arising issues and receive findings and support learning from the findings.

Example of a programme logic/logic map



The Request for Proposal

Request for Proposal, Invitation to Tender, Specification, Invitation for Bid, Request for Quotation, Briefing Notes, Quotation Document. We've seen many incarnations. But whatever it's name, this document is essential for both inviting providers to bid to undertake specified services and provides comprehensive information to the potential bidders concerning the project's requirements.

In preparing a consultancy brief, include all the guidance an evaluator will need to design and cost a high quality proposal that meets your needs. As a minimum, and not including more generalised procurement content, we recommend incorporating:

- The policy context for the programme – providing sufficient background for those tendering to understand what the programme is trying to achieve and how this aligns with wider organisational goals should encourage ideas for added value.
- The programme being evaluated, ideally including a programme logic that articulates the intended causal pathway between defined activities and outcomes
- The purpose of the evaluation, including the strategic context, audiences and intended uses
- Key questions that the evaluation needs to address / objectives it needs to meet, and that can be realistically answered
- Methodological requirements or preferences, if known. This should include information about the availability of documentation or data, and any access requirements to stakeholders for survey or interview
- Key stakeholder preferences for engagement with the evaluation
- Key ethical considerations and risks that the evaluation will need to manage, including any potential requirement for formal ethics approval
- Governance arrangements for the evaluation, including reporting requirements and review processes during the evaluation period
- Realistic and clear expectations around the timeframe, deliverables and budget. If the budget cannot be disclosed, at least provide a clear indication of the scale of the evaluation (e.g. sample size requirements or statistical precision). This will enable greater comparability of proposals received.
- Who will retain the intellectual property produced during the evaluation
- Expectations regarding dissemination of the evaluation methods and findings including publication or skills transfer.

Ready? Set. Commission!

Hopefully this guide will help you to prepare for - and if an external contractor is appropriate - procure your evaluation. It has been developed from our extensive experience of designing and delivering evaluation for a predominantly public sector client base for over twenty years. Clients use our evaluations to understand what works, why and how much in order to make robust, evidence based decisions about policy, programme or service intervention.

But; don't just take our word for it. Below are some pearls of wisdom from David McElroy, The Energy Saving Trust's Evaluation manager, who is an experienced evaluation commissioner.



Be...

<p><i>flexible:</i></p> <p>It's likely that your evaluation will change as the project evolves, so build in the capacity to adapt</p>	<p><i>adaptable:</i></p> <p>Your evaluator might propose alternative methodologies or approaches. Consider their advice</p>	<p><i>transparent:</i></p> <p>Encourage your evaluator to be transparent with methods to keep you informed and involved. More technical aspects can be included as footnotes and appendices</p>	<p><i>open:</i></p> <p>You shouldn't just be told what they think you want to hear. Your evaluator should be encouraged to 'give it to you straight' if something didn't work in the project, the evaluation or elsewhere.</p>
---	---	---	--

We can help you with your evaluation needs. Whether it is an informal chat to provide a few pointers, or to better understand how evaluation could be used to improve your programme delivery and performance, please do get in touch.

GET IN TOUCH

Ground Floor, Baskerville House, Centenary Square,
Broad Street Birmingham B1 2ND

T +44 (0)121 285 3800
E info@winningmoves.com

winningmoves.com