Evaluative Thinking

Seeking Evidence

ET WORKSHOP
ROUND 2 • GROUP 3
Introductions

Please share:

• Your name
• Your area of work
• Time working with CRS
• What brought you to CRS?
# ET Workshop Series

<table>
<thead>
<tr>
<th>Target audience</th>
<th>Round 1 Identifying Assumptions</th>
<th>Round 2 Seeking Evidence</th>
<th>Round 3 Taking Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Group 1 Field-based staff</td>
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<tr>
<td>Group 2 Senior program staff</td>
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<td>Group 3 Country leadership</td>
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ET Workshop Series

NINE WORKSHOPS IN ALL: 1 PER GROUP PER ROUND

GROUP 1
FIELD-BASED STAFF

GROUP 2
SENIOR PROGRAM STAFF

GROUP 3
COUNTRY LEADERSHIP

ROUND 1

• Introduction to evaluative thinking
• Identifying assumptions
• Multiple perspectives
• Theory of Change (ToC) Pathway Models

ROUND 2

• Using the ToC Pathway Models to determine learning plan scope
• Developing learning questions
• Components of a learning plan
• Learning plan alignment

ROUND 3

• Making meaning from results
• Participatory analysis
• Making informed decisions (utilization)
• Communicating results
Your Workshop Goals

What would YOU like to get out of this workshop?

“For me, this workshop will be a success if…”

1. Jot down a couple of ideas for yourself.
2. Share: As we go around the room, select one goal to share that has not been shared by someone else.
Workshop Goals

Continue to build capacity to …

1. Talk about and explain ET to others
2. Support ET activities and habits
3. Work to overcome barriers to ET
4. Use ToC Pathway Models to systematically set learning priorities
5. Develop learning questions and outline learning plans to address these questions
6. Continue to identify ways to respond to the MEAL Competency Model, Competency No. 6: Analysis and Critical Thinking.
A little housekeeping…

- Shared norms for the workshop
- Consent form and pre-workshop survey
- Learning-to-action plan
- Post-workshop survey
## Agenda

<table>
<thead>
<tr>
<th>Time</th>
<th>Task</th>
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<tbody>
<tr>
<td>8:00am</td>
<td>Introductions and goals, consent form, pre-workshop survey</td>
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<tr>
<td>8:30am</td>
<td>Defining, defending and supporting ET</td>
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<tr>
<td>9:00am</td>
<td>Setting learning priorities</td>
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<tr>
<td>10:00am</td>
<td>Break</td>
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<tr>
<td>10:15am</td>
<td>Learning plan development for leadership</td>
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<tr>
<td>11:30am</td>
<td>Reflect and debrief, post-workshop survey</td>
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<tr>
<td>12:00pm</td>
<td>Close</td>
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</table>
What is Evaluative Thinking?
Evaluative Thinking: Formal definition

ET is critical thinking applied in the context of evaluation (or MEAL), motivated by an attitude of inquisitiveness and a belief in the value of evidence, that involves:

1. Identifying assumptions
2. Posing thoughtful questions
3. Pursuing deeper understanding through reflection and multiple perspective taking
4. Making informed decisions in preparation for action

(BUCKLEY, ARCHIBALD, HARGRAVES & TROCHIM, 2015)
Evaluative Thinking
Where it fits in

MEAL requires:
• Knowledge: understanding of the “how” and “why” of basic MEAL concepts, terms, methods and resources
• Working skills: observation, analysis, communication, etc.
• Thinking skills: reflection, questioning, strategizing, mental modeling, perspective taking, decision making, the ability to identify assumptions
• Attitudes: belief in the value of MEAL, an intrinsic motivation to pursue evidence
Learning to think evaluatively

• Anyone can do it, but it is not trivial and requires habitual practice
• Requires a “safe space” for questioning, identifying assumptions, making suggestions
• Start with small changes and ramp up (one can’t change the culture of a program or organization overnight)
• Must be applied in multiple contexts alongside peers and colleagues
• Learn from how others in CRS are doing it
Connecting ET to Evaluation

• Harness the power of knowledge workers (those who know the most about the program and how to improve it, but have the least time to do more with that knowledge) through conversation

• Make sure that good ET is the basis for all evaluation (both formal and informal), then make informed decisions about which learning questions require formal evidence gathering
Summary

• ET is a “habit of mind,” motivated by a desire to always do better, that is characterized by identifying assumptions, developing learning questions, seeking evidence and making informed decisions.

• Organizations and programs that want to maximize efficiency and impact should consciously adopt a culture of ET, where all members of the organization support ET and engage in ET conversations and habits together.

• Promoting ET is as simple as asking a colleague, “What assumptions do you think we are making in this situation?”
Supporting Evaluative Thinking

- Be open to questioning, various perspectives and plausible alternatives
- Encourage trust-based, safe communication among all staff, beneficiaries, supervisors and other stakeholders
- Demonstrate reflection (My observations indicate I may have been more effective if …)
- Identify ET champions and provide time and space for them to train/support others
- Build ET into everyday activities (planning meetings, regular communication, etc.)
- Reward evaluative thinking
- Other ideas?
Principles for Promoting ET
Review Learning-to-Action Plan

See handout: *Learning-to-Action Plan*
Barriers to Evaluative Thinking
Overcoming Barriers to ET for Leadership

See handout: *Overcoming Barriers to ET*
Using ToC Pathway Models to Set Learning Priorities
Theory of Change Pathway Model

**Activities**

**SHORT-TERM OUTCOMES**

- Increase Knowledge
- Change Attitudes
- Change Behaviors
- Change Skills

**MID-TERM OUTCOMES**

- Share with Peers
- Overcome Barriers
- Community Improves

**LONG-TERM OUTCOMES**

*Activities*

*Outputs*

*Intermediate Results*

*Strategic Objectives*
Theory of Change Pathway Models

- How do our activities contribute (step-by-step) to our intended outcomes?
- What are our assumptions about how/why things connect?
- What’s missing?
- What’s unnecessary?
Mining the Model
Mining the Model

**Activities**

- Workshop 1
- Workshop 2
- Follow-up

**Outputs**

- Increase knowledge
- Change attitudes
- Increase skills
- Change behaviors
- Share with peers
- Overcome barriers

**Intermediate Results**

- Community improves

**Strategic Objectives**

- Increase knowledge
- Change attitudes
- Increase skills
- Change behaviors
- Share with peers
- Overcome barriers
- Community improves
Mining the Model

Activities

Outputs

Intermediate Results

Strategic Objectives

WORKSHOP 1

INCREASE KNOWLEDGE

SHARE WITH PEERS

COMMUNITY IMPROVES

WORKSHOP 2

INCREASE SKILLS

OVERCOME BARRIERS

FOLLOW-UP

CHANGE ATTITUDES

CHANGE BEHAVIORS

?
Mining the Model: Reaching for their Potential
Break
Working with questions: Putting ET to use

- **Reflect on identified assumption, pose question**
  - **Less formal evidence gathering needed**
  - **Formal evidence gathering needed**

- **Internally credible evidence**
  - **Systematic, externally credible evidence**

- **Logical conclusion**
  - **Do nothing**
  - **Immediate adaptation**
  - **Modification/Program plan review**
  - **Strategic decision making**

No evidence needed
Learning Planning

EVALUATIVE THINKING

- FORMAL EVALUATION
- LEARNING PLANS
- LESS FORMAL EVIDENCE GATHERING FOR LOCAL USE
- IMMEDIATE ADAPTATION
Mining the Model

**Activities**
- Workshop 1
- Workshop 2
- Follow-up

**Outputs**
- Increase knowledge
- Change attitudes
- Increase skills

**Intermediate Results**
- Change behaviors
- Overcome barriers
- Share with peers

**Strategic Objectives**
- Community improves
Learning Questions

What kinds of questions might a program be asking about this short-term outcome?
Learning Questions

Examples:

• Is activity X associated with outcome Y?
• Do participants report that they are satisfied with activity X?
• Does activity X cause participants to experience outcome Y?
• Do participants report experiencing outcome Y?
  • Which participants do/don’t report experiencing outcome Y?
  • What differentiates them and the experiences they report?
## Words Matter!

<table>
<thead>
<tr>
<th>LQ1</th>
<th>LQ1A</th>
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<tbody>
<tr>
<td>Is participation in</td>
<td>Does activity X cause</td>
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<tr>
<td>activity X associated</td>
<td>outcome Y?</td>
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<tr>
<td>with outcome Y?</td>
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Brainstorm Learning Questions

Brainstorm a list of three draft learning questions
Constructs

Those hard-to-define variables that you often want to collect evidence about. Such as:

- Knowledge
- Motivation
- Awareness
- Interest
- Access
Constructs

Learning question example:
Do participants in my program have access to healthy foods?

Evaluative thinking:
What assumptions are we making in posing this question?
How would our stakeholders define this construct?
How are we defining this construct?
Evidence Gathering

Selecting the right method for the job

Simple post-event satisfaction surveys are not really adequate for ensuring good (“big”) decisions about a long-established, consistently implemented, and possibly large program.

Complex strategies (perhaps with control groups and randomization) are inappropriate for evaluating newly developed programs, or for making relatively “small” decisions.
Alignment

A project learning plan is ‘aligned’ when the methods proposed will lead to the collection of the evidence/data that will allow the evaluation question to be credibly addressed.

*In other words:* A project learning plan is well aligned when the question, methodology and intended claim “match up.”
## Misalignment

<table>
<thead>
<tr>
<th>Question</th>
<th>Method</th>
<th>Analysis</th>
<th>Intended Claim</th>
</tr>
</thead>
<tbody>
<tr>
<td>How do participants intend to change their behavior after participating in the ET training program?</td>
<td>Post-program focus group</td>
<td>Record responses, look for and report themes related to behavior change</td>
<td>Participants change their behavior as a result of participating in the ET training program</td>
</tr>
<tr>
<td>Do participants report satisfaction with the ET training program?</td>
<td>Pre-post survey with control group</td>
<td>T-test for change, check for statistical difference with control group</td>
<td>Many participants have reported satisfaction with the ET training program</td>
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</table>
Alignment Reflection

• How does ET help with alignment?
• What would a project learning plan without ET look like?
Project Learning Plan

The WHY
WHAT
WHO
HOW
and
WHEN
of evidence gathering
Measurement: How?

Knowledge

- Ability to apply knowledge in a new context
- Ability to demonstrate skills
- Ability to answer questions

Knowledge measurement methods:

- Written work
- Observation
- Interview
- Survey
- Focus group
- Oral test
- Written test
- Observation
- Written work
- Third party report
- Standardized test scores
Sample

The sample is the set of individuals you intend to collect information from or about. The sample is either equal to, or is a portion of, the population of interest.

Sample selected from population

Sample = population
Design: *When?*

- The Learning Plan design tells when information is collected.

- It also answers the question (about evaluation findings): “compared to what?”

- Choice of design varies depending on evaluation purpose, evaluation question, program context and feasibility.

- Examples: post-only focus group, pre-post with control group, etc.
Learning Plan Development for Leadership

The WHY
WHAT
WHO
HOW
and
WHEN

of evidence gathering
Learning Plan Development for Leadership

See handouts:

Guidance for Wording Learning Questions

Key Constructs and Measurement

Project Learning Plan

Learning Plan Template: Table Format
Reflection

Thinking about today’s workshop:

- How are evaluative thinking and learning planning related?
- Why is ET important even in cases when you are not part of the learning planning team?
Workshop Feedback

Thinking about today’s workshop:

• What are some key “takeaways” for you?
• What are you still unsure about?
• How could today’s activities better meet the goals set out in the morning?

*Use the sticky notes provided. Stick your responses to the corresponding chart paper.*
Organizing your ET notebook
## Organizing your ET notebook

<table>
<thead>
<tr>
<th>Handouts</th>
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<tr>
<td>Consent form</td>
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<td>Pre-workshop survey</td>
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<tr>
<td>What is evaluative thinking?</td>
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<td>Principles for promoting ET</td>
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<tr>
<td>Learning-to-action plan</td>
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<tr>
<td>Overcoming barriers to ET</td>
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<tr>
<td>Theory of Change Pathway Models</td>
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<tr>
<td>Mining the model</td>
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<tr>
<td>Example model: Reaching for their potential</td>
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<tr>
<td>Guidance for wording learning questions</td>
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<tr>
<td>Key constructs and measurement</td>
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<tr>
<td>Project learning plan</td>
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<tr>
<td>Learning plan template</td>
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<tr>
<td>Learning plan template: Table format</td>
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<tr>
<td>Post-workshop survey</td>
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</tbody>
</table>
Post-Workshop Survey

• Please fill out the Post-Workshop Survey
Thank you!
References


