



# Evaluation strategy 2015-2017

Global strategy document



June 2015

## Vision

**VSO's vision for 2015 -2017 is to embed a culture of learning and evaluation throughout the organisation and its programmes, in order to drive VSO programme's relevance, effectiveness, impact and sustainability and to increase VSO's understanding of the distinctive contribution of volunteering to sustainable development.**

Evaluations are systematic assessments of on-going or completed projects, programmes or policies, their design, implementation and results. Evaluations should provide information that is credible and useful, enabling the incorporation of lessons learned into the decision– making process.<sup>1</sup>

Evaluations offer an opportunity to explore how and why things have occurred and to understand the value delivered by any component part of a programme, project, service or organisation. Evaluations draw on monitoring data and enable time and space for reflection.

VSO aims to achieve its evaluation vision by strengthening a culture of evaluation, learning and reflection and ensuring that staffs across VSO are equipped and resourced to appreciate the value, nature and importance of evaluation and proactively incorporate evaluative questions and exercises into programme design and architecture.

This vision will be achieved by the end of 2017 through:

1. Building **learning and evaluative questions and processes within programmes design and architecture** and ensuring they drive programmes and organisational monitoring practices and data collection.
2. Increasing the number of **collaborative internal evaluative and learning exercises** conducted across programmes.
3. Using generated findings to **facilitate learning**, understand the impact and sustainability of our work and drive programme improvement.
4. **Sharing best practice** of rigorous evaluations methodologies, approaches and findings amongst all staff across VSO.
5. Increasing the **strategic choice of global or meta-evaluations** across thematic and geographic areas.
6. Increasing VSO's **capacity and confidence to decide on the need and relevance of external evaluation and to commission and manage** strong evaluations using external experts when this is deemed necessary.

## Why evaluate: to improve and prove what we do

VSO is committed to strengthening its ability to understand its efficiency, effectiveness as well as the impact of its programmes.

We know that timely evaluation plays a critical role in enabling us to understand the contribution we make in delivering sustainable development. Rigorous evaluations will allow VSO to:

- **Improve** what we do – learning from experiences (positive and negative) to inform programme development, and
- **Prove** what(and how) we do – build evidence base and be accountable to different stakeholders, including donors, partner / peer organisations and (most importantly) the poor and marginalised communities we serve.

## How and when to evaluate: approaches and methods

It is critical that evaluative exercises are built appropriately in programme cycles and that space and time for evaluations is planned for at the right time.

VSO will endeavour to plan evaluations at the beginning, during implementation and after the closure of projects and programmes, whenever possible and relevant.

Specifically we will carry out across programmes and projects:

- **Developmental evaluation**, which we will use to support and guide innovation (emerging initiatives) in complex and/or uncertain situations and where the intervention model does not yet exist.

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<sup>1</sup> DAC OECD definition <http://www.oecd.org/development/peer-reviews/2754804.pdf>

- **Progress review** during the implementation of an intervention – to help us understand what is working well and what is working less well. This type of analysis will ensure continuous tracking of progress and, if necessary, adjustment of implementation strategies to achieve better results.
- **Final evaluation and impact assessment**, once we have completed intervention – to help us understand if we have been able to bring about lasting change for individuals, organisations or communities. These evaluations (of a summative nature) will help us also understand how we have contributed to change.

Between 2015 and 2017 VSO will promote evaluation practices according to the following priorities:

- Ensuring that all **large scale programmes** have all stages of evaluation built in from the planning. Specifically, we want to ensure that all proposals for restricted funding that exceed £0.5million in value – or those that propose innovative forms of intervention – include an appropriate and adequately resourced evaluation plan.
- Ensuring that **all programmes M&E frameworks** include evaluation and learning questions.
- Evaluating **innovative programmes** to understand if they are having the desired results or if there is potential to scale up.
- Promotion of **participatory approaches** to evaluation i.e. a one way or two way flow of information between the evaluators and primary actors and other stakeholders for the purpose of improving evaluation processes, findings and use. This will involve consideration of gaining feedback at each stage of evaluation process: design, evidence gathering, data validation and dissemination.
- Conducting **meta-evaluations to test the assumptions behind our theories of change**.

## Resourcing, and when to evaluate externally or internally

Resourcing for an evaluation should be estimated realistically during the project planning stage, as part of a wider, integrated Monitoring, Evaluation & Learning (MEL) plan. No funding proposal should be submitted with less than 5% allocation for M&E activities and we will aim at raising this where feasible to 10% of the overall project direct costs.

The purpose and scope of an evaluation should be carefully considered when determining how best to resource it, both in terms of budget and human resources.

There are many considerations to take into account when deciding whether to conduct an in-house evaluation, seek out outside help or indeed combine elements of both. These include potential donors' requirements and the internal availability of the relevant technical expertise.

During the 2015-17 we aim to increase VSO's volume of evaluative exercises conducted internally, as collaborative exercise amongst SPEG and programmes.

At the same time we will build the capacity of staff across VSO to commission and manage external evaluators effectively when an evaluation requires independence and objectivity or is highly technical.

Internal evaluations will include:

- Country specific, regional or wider meta-evaluation conducted by the Impact and Accountability team, global advisers and the programme teams.
- Internal peer review processes amongst different programmes.
- Country team lead evaluations in a structured, self-reflective way.

## Sharing knowledge and making use of evaluation findings

Evaluations offer a great learning opportunity, and in nearly all cases, the process of evaluatory reflection can be as (if not more) helpful than the final written deliverable. Learning should happen throughout the process and, involving the right people can ensure that we act upon the findings.

Utility must be a key consideration for every evaluation commissioned by VSO. At the outset, the person commissioning or planning the evaluation should clearly state how the evaluation will be used and who the audience will be. Specifically, in future, all VSO evaluations will be required to have in place:

- A **steering group**, including the key stakeholders for the intervention / analysis. This group should help to plan, oversee and quality assure the evaluation process;
- A **communications plan** – detailing how learning will be shared with the relevant audiences; and,



- Upon completion, a **management response note** – detailing how relevant staff and stakeholders will respond to the recommendations made.

## How we will monitor, evaluate and improve progress in delivery of this strategy

An Evaluation Advisory Committee will guide the delivery of this evaluation strategy and the implementation plan. It will make strategic decisions about VSOs investment in evaluation, monitor progress against target deliverables, and assess and review evaluation priorities. The committee will meet on a quarterly basis and be chaired by the Head of Impact & Accountability.

The evaluation board will agree on the evaluation plan for each year, devised on the basis of an analysis of specific requests from programmes, global advisers and other parts of VSO and on the need to continuously test VSO's Theory of Change and understand the specific contribution of volunteering to sustainable development.

## Next steps

Over the last 12 months VSO has started to build evaluation capacity. Through the Impact & Effectiveness Programme, we have supported the delivery of five high-quality studies. We have also participated in a number of robust evaluation studies. We recognise the organisational value of this work and are committed to maintaining the momentum and building on learning from our evaluation programme to date.

Over the next two years we will develop a programme of evaluations which explore, investigate and test VSO's theories of change assumptions and perceptions and help us understand the impact and sustainability of our work. This programme will be developed in collaboration with programmes and policy staff.

The Evaluation Advisory Committee will include senior-level representation for VSO's key functions and will steer our evaluation programme, identify evaluation priorities and effectively target evaluatory resources towards the areas where they can be of greatest organisational benefit.

Technical leadership on evaluations will come from the Impact and Accountability team and the ability to build evaluation capacity will be dependent on support from the Global Leadership Team, regional staff and senior managers across the organisation.

There are three key work strands to the delivery of this strategy which are outlined in more detail in the implementation plan:

- **Building a culture of evaluation and learning** - We will ensure that evaluative exercises are rooted in programme cycles and design and that all programmes develop learning and evaluation questions. All evaluations approved by the evaluation board will be communicated and disseminated widely inside VSO and opportunities for broader engagement will be proactively sought. Furthermore we will develop and deliver a comprehensive communications plan to build awareness across VSO of the value, nature and importance of evaluation.
- **Delivery of evaluations** - We will scope and deliver an annual programme of high quality internal and external programme evaluations encompassing a geographic and thematic spread.
- **Building capacity** - We will develop and deliver an extensive programme of activities to support and build the capacity of staff across VSO as they build high-quality evaluation into their everyday work.

Important work has already started over the last 12 months through enhanced Impact and Accountability team support for programme staff who are commissioning and delivering evaluations, and through the development of a module on evaluation to sit within VSO's wider global Managing for Results (MEL) e-learning curriculum. This Evaluation Strategy is a significant next step forward in building awareness of evaluation across the organisation, and we believe that through pursuing the priorities set out within it we can successfully build evaluation capacity and embed a culture of evaluation across VSO.

More operational detail on VSO's approach to evaluation can be found in the Evaluation Strategy Implementation Plan, and within a suite of evaluation "how to" notes to be published by the Impact & Accountability team during 2015 which will provide guidance on scoping evaluation opportunities, constructing evaluation questions and selecting appropriate approaches/methodologies.