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AGGREGATING EVALUATION FINDINGS FOR JOINT REFLECTION AND LEARNING: A META EVALUATION

A project evaluation is an integral part of project management in development cooperation and is a key moment for learning and change. Evaluations provide stakeholders with the opportunity to take stock, project managers to make corrections in the direction the project is taking, and organizations to account for spending. Helvetas commissioned an internal Meta Evaluation to systematically identify recurrent findings of project evaluations and propose mechanisms on how to draw lessons from evaluations more effectively by translating them into improved practice. Based on the belief that a participatory evaluation process and shared recommendations lead to learning, ownership and institutional change, the Meta Evaluation was designed as a collective reflection exercise. This issue sheet shares highlights of the Meta Evaluation design, process and findings. It covers experiences of over 60 selected evaluations of projects implemented by Helvetas and Intercooperation between 2009 and 2011.

OBJECTIVES AND SCOPE OF THE META

EVALUATION

The purpose of the Meta Evaluation was to identify recurrent findings, conclusions and recommendations of all 60 project evaluations, conducted by Helvetas and Intercooperation between 2009 and 2011. The Meta Evaluation was also intended to propose mechanisms for the organisation to effectively draw lessons from evaluations and translate them into improved practice. All evaluations and reviews produced in three years in a total of about 300 ongoing projects were considered in the analysis. A sample of 40 % of the evaluations – representative in terms of geographic location of the project, working area and evaluation type – was analysed in more detail.

VIDEO

The video on the **origins and scope of Meta Evaluation** provides answers to the key questions below (or provides an insight into the methodological framework as well as into main findings and outcomes of the Helvetas' Meta-Evaluation).



Link to the video:
http://www.helvetas.org/achievements/learning_from_evaluation/

KEY QUESTIONS

- What are the key recurrent thematic findings, conclusions and recommendations from the evaluations of Helvetas and Intercooperation projects over the past three years? Findings from the five working areas are structured around the DAC criteria sustainability, relevance, effectiveness, efficiency and gender aspects
- Considering procedural and methodological aspects – timing, design and implementation – what are the existing learning and follow up mechanisms and how should they be enhanced to improve organisational learning?

EXPECTED OUTPUTS AND

METHODOLOGY

As illustrated by the graphic right, Helvetas monitors and evaluates its activities using different approaches, such as case studies, impact studies and project evaluations. Some studies are designed to measure outputs and outcomes and others intend to grasp changes at the level of impact.

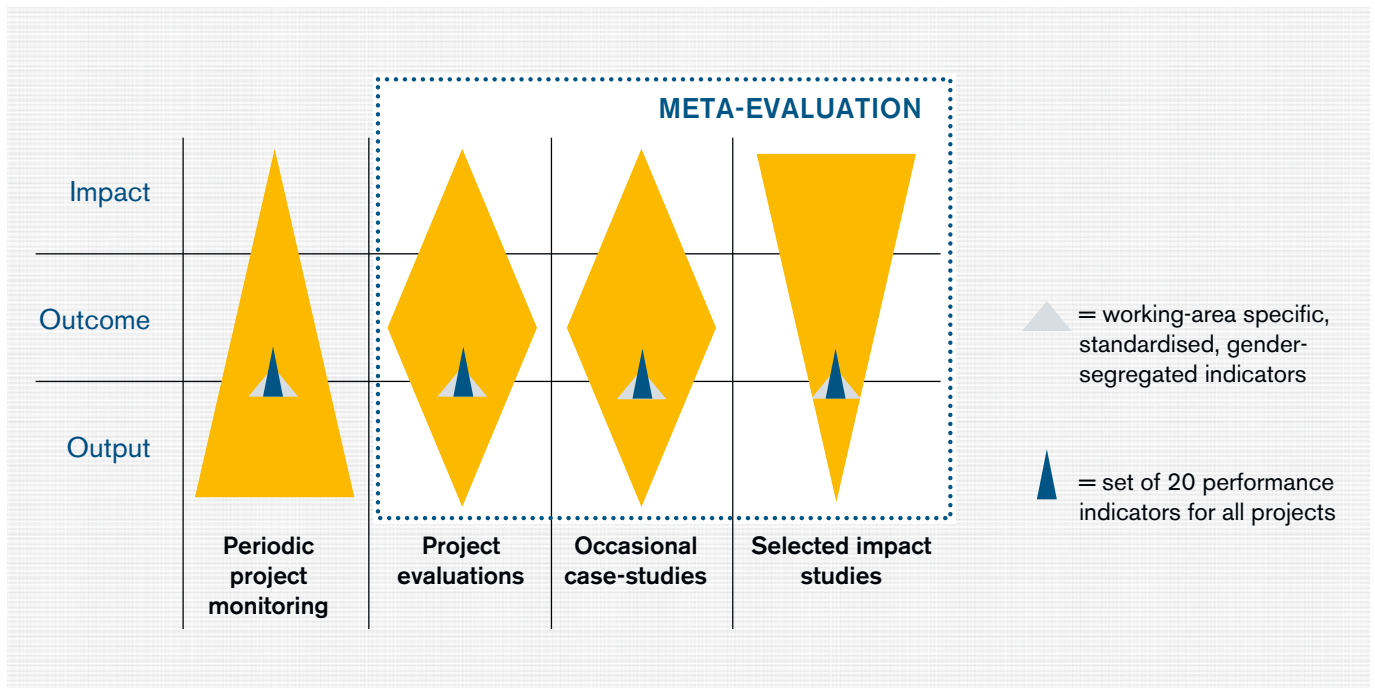
The Meta Evaluation was designed to maximize learning and steering objectives. As it was a first reflection exercise on recurrent findings of previously conducted evaluations, the exercise itself was an important “learning output” in terms of organizational learning. A considerable number of staff was engaged in the reflection process and several methodologies were used:

- **desk research** (including an online survey to get impressions from the field);
- semi structured **interviews** to complement and validate the preliminary findings from the desk research
- **facilitated Face-to-Face reflection moments** to analyze findings collectively, in order to complement the findings with unwritten lessons learned

The Meta Evaluation provided a space for individual and collective reflection around past evaluations as well as for testing new methods for learning from evaluation pro-

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The Meta Evaluation within the overall Helvetas Monitoring and Evaluation system.

cesses. For example, visual methods (e.g. digital storytelling, video statements, video documentation) were applied to enhance joint reflection processes. The intranet was used to encourage remote participation in the Meta Evaluation and inform interested colleagues around the world on key milestones in the evaluation, as well as acting as a repository for key outputs of the exercise.

Besides collective learning, other expected outputs were:

- the **report** (and complementary audio visual products) as a capitalisation product
- organisation-wide lessons and **recommendations for steering**, also regarding improving **learning mechanisms**
- areas and questions for **further research**
- suggestion(s) on **how to continuously learn** from evaluations

A management response took stock of the different outputs and determined which recommendations would be followed up on and how.

Recurrent thematic findings were identified both within each working area as well as across them. Recurring methodological findings were identified by disaggregating evaluation reports into different evaluation types (i.e. mid-term reviews, end of phase evaluations, strategic controlling, impact assessments and after departure visits). Also, challenges highlighted in a number of evaluation reports concerning their design, realisation and presentation were aggregated.

RECURRENT THEMATIC FINDINGS

The recurrent findings within each working area were very specific and can be found in the Meta Evaluation report.

Across working areas, i.e. thematic and geographic boundaries, the Meta Evaluation considered all Helvetas and Intercooperation projects to be relevant. Effectiveness was measured to differing degrees, but the overall project implementation was evaluated as effective. Most evaluation reports also found that evaluated project implementation was efficient. However, the Meta Evaluation found that it was not always clear how the authors of the evaluation reports came to this conclusion.

Sustainability is an important and challenging issue. There is still room for improvement regarding institutional, economic and social sustainability of project outcomes. Many evaluation reports emphasised that although gender and social equity are being mainstreamed in projects, Helvetas should invest more in these issues to overcome constraints in terms of competencies, time, budget, etc.

One important additional challenge was that Helvetas and Intercooperation (like many other similar organisations) find it difficult to scale up. Also generally challenging is dealing with multiple partnership relations and approaches. Helvetas should be more clear on which organisations it works with, for what reasons and in what ways. There is also potential for more collaboration among projects within and between countries. Some evaluation reports suggested that certain issues related to project management remain to be tackled, e.g. improved handing over and other human resource processes.

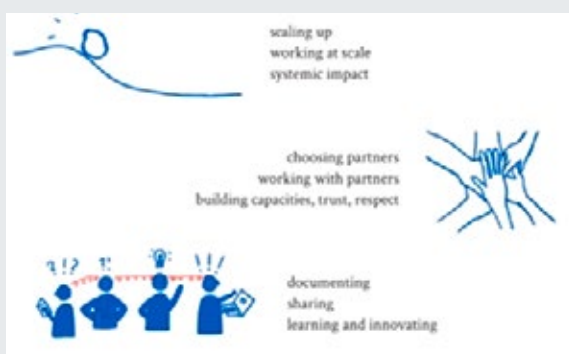


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THEMATIC FINDINGS

Recurrent thematic findings of evaluations state challenges in:

- scaling up and archiving systemic impact
- finding and working through partners
- building up local capacities
- documentation and knowledge sharing
- results based project management
- human resource management



METHODOLOGICAL FINDINGS

Recurrent methodological findings of evaluations state challenges in:

- application of DAC criteria and the use of impact hypothesis
- availability of data and background documents
- participation in M&E processes and learning through them
- presenting, sharing and using M&E results



RECURRENT METHODOLOGICAL

FINDINGS

Although there were differences among the various evaluation types, such as mid-term reviews, end of phase evaluations, impact assessments, etc., there were far more generally applicable findings regarding how Helvetas designs, conducts, presents and uses evaluations. For example, many evaluation reports were very long and included many acronyms. Also, they were not structured along the OECD DAC evaluation criteria. This rendered the understanding, sharing and use of the evaluations results rather difficult. Another recurrent issue concerned participation and learning. Most evaluations were not designed as participatory exercises. Therefore it was often unclear who was involved in reaching findings, identifying recommendations and their follow up.



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CONCLUSIONS OF THE META

EVALUATION

As a result of joint reflections (online and two face-to-face events in Switzerland) on the recurrent findings of the Meta Evaluation some areas for further actions were identified:

- Maximise Helvetas influence in the design of evaluations, e.g. by making sure that the terms of reference explicitly state why an evaluation was commissioned, which methodologies are to be used, and whether an internal reflection moment is planned.
- Communicate more effectively with evaluators to ensure that they also mention positive results and findings in their evaluation reports and outputs. This aspect was highlighted by staff as being crucial, especially because evaluators often do not capture positive findings even though they were recognised by staff and partners.
- More periodic internal reflection moments need to be undertaken to share project experiences as well as innovative ideas.
- More attention needs to be paid to the methodological aspects of evaluations, including making them participatory and learning oriented
- Energy needs to be invested to explore how evaluation reports and results can be shared more systematically in the future
- All evaluations should carefully assess where progress was made regarding gender and social equity and where there are still blockages

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« *The Meta Evaluation is appreciated for the chosen mix of participatory methodologies in coherence with its focus on learning. The presentation of the results using videos is innovative and provides an interesting tool for sharing the findings among English speaking colleagues in partner countries.* »

Management Response to the Meta Evaluation

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VIDEO

The video summarises the key findings and recommendations of the meta evaluation



Link to the video:
http://www.helvetas.org/achievements/learning_from_evaluation/

The Meta Evaluation report ended with a more exhaustive list than the one above, summarising the key findings and recommendations. It also identified areas with a need for further research and ideas for follow up, e.g. working area specific Meta Evaluations.



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FOLLOW UP AND LESSONS LEARNT

The management response to the Meta Evaluation endorsed all recommendations, outlined key measures to be taken and identified the leaders responsible for making the changes at different levels of the organization. Subsequently, an action plan was produced.

The Meta Evaluation was greatly appreciated – not only for the findings and recommendations it produced, but also for the space for joint reflection that it created. The participatory element was very important as it was critical in capturing experiences and lessons learnt from evaluations. Also, it strengthened the ownership of the recommendations that came out of the Meta Evaluation. The Meta Evaluation helped identify mechanisms on how to learn more effectively from evaluations. Recognizing that some evaluations may be more suitable for learning than others, Helvetas is nevertheless committed to making evaluations in general more learning oriented. Certain conditions have to be met to make sure that the maximum is gained from evaluation exercises. Efforts and investments in terms of time and resources (financial/skills) are being made to this end.

« M&E needs to be more participatory, capturing the views of the intended ‘beneficiaries’ »

Staff opinion expressed in Meta Evaluation survey

MORE INFORMATION ON THE 2012

META EVALUATION

The executive summary and the two videos on the Meta Evaluation are available at http://www.helvetas.org/achievements/learning_from_evaluation/

The complete Meta Evaluation report is available on request. Please contact the Knowledge and Learning team to receive the report and further information: knl@helvetas.org

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