Webinar: Introduction to Evidence-Based Project Design

March 26, 2024, 12:30 – 1:30 PM ET

Transcript

Introduction

Sally Beiruti: Welcome, everyone. We're going to get started shortly. We'll just give people a minute to join. All right, I can still see people trickling in, but I think we can get started. Hi, everyone. Thank you all for joining us today for our webinar titled Introduction to Evidence-Based Project Design, which will run for 60 minutes and is being recorded. This webinar is brought to you by Switchboard, a one-stop resource hub for refugee service providers.

Zoom Orientation

SB: Let's do a quick overview of your settings in Zoom. This is a webinar, so you're joining on listen-only. Due to the large number of learners on today's webinar, we've disabled the chat box. However, you do have the option to send messages in the Q&A. We'll aim to leave time at the end for a Q&A, but we'll also have moderators, two of my colleagues, reading your questions throughout the webinar, who will be answering some of your questions as you send them.

SB: Again, today's webinar is going to run for 60 minutes and is being recorded. You'll receive an email with the recording, slides, and recommended resources within 24 hours. The webinar transcript, along with the recording, are going to be posted on the Switchboard website within the following days. Last, we ask that you kindly complete our webinar satisfaction survey at the end of this session. It's a short survey that helps us here at Switchboard continuously improve our training and technical assistance offering.

Today's Speaker

SB: To start, my name is Sally Beiruti. I'm going to be presenting today's webinar. I'm Switchboard's Program Manager for Monitoring and Evaluation. Prior to joining Switchboard, I worked on different projects related to forced displacement in global context, including the monitoring and evaluation of projects and the development of educational content.

Learning Objectives

SB: Let's take a look at the learning objectives of today's session. By the end of this webinar, you'll be able to define key terms related to monitoring and evaluation, and project design; distinguish between two important logic models, specifically theories of change and logframes; explain the importance of evidence-informed

project design in the refugee resettlement space; and determine how various types of evidence can inform project design decisions.

1. Defining Key Terms in Project Design, Monitoring, and Evaluation

SB: For our first section, we'll start by sharing definitions of some important key terms in monitoring and evaluation. You might already be familiar with these terms, but the goal is for us to establish a common meaning that we'll be using throughout the rest of the webinar.

Monitoring

SB: Starting with the "M" in M&E, so monitoring—monitoring is the process of continuously tracking how your project is doing. It's an ongoing process of systematically collecting, managing, and analyzing data or information to be able to track the progress of your project and the process of implementation. Through monitoring, an important question that we often answer is, "Are we reaching our targets or not?" Next slide, please.

What does monitoring look like?

SB: What does monitoring look like? Monitoring includes various data collection analysis activities. This could include attendance tracking, the development of data collection tools, data quality checks, and reporting. We then use the findings of our analysis to reflect on the progress of our project implementation. To meaningfully reflect on the process and progress of project implementation, we consider what our data has told us and then ask and answer some key questions about the project on a granular level. Some examples of key questions could include, "Are we fully reaching our intended target group? Are there parts of this target group that we're missing? And are the project activities being implemented as planned?"

What are some benefits of monitoring?

SB: Thank you. There are clear benefits to effectively monitoring the project, and we just want to talk about a few of them here. First, at its heart, effective monitoring is about genuine real-time learning that informs project implementation and contributes to the project's ultimate success. Also, based on the answers to monitoring questions, we can identify if and where near-term or short-term modifications to the project implementation or project activities may be needed to ensure the project ultimately meets its targets and reaches a desired target group. Additionally, monitoring can ensure that the project is compliant with funder requirements, and of course, it allows for upholding transparency and accountability.

Evaluation

SB: Now moving on to evaluation. Like monitoring, evaluation is a process of collecting and analyzing information or data to answer questions about your project. However, where it's different is where monitoring seeks to give us information about the project throughout its implementation with the goal of informing real-time modifications to keep the project on track, evaluation only occurs at the end of a project or at the end of a phase of the project. The questions answered through evaluation are also different than the questions answered through monitoring. In evaluation, the goal is to assess whether the logic behind your project was

sound and examine the reasons behind whether you achieved the project outcomes or not. At evaluation, we're able to tell what elements or factors played a role in bringing about the results that we see.

What does evaluation look like?

SB: Evaluation looks like analyzing data at the end of a phase of a program or the end of the program as a whole to answer some big questions about the program's progress. These questions can include, “Do we see the changes that we're expecting to see? Why or why not? How cost-effective was the program? Were there any unintended results that need to be addressed?” These questions illustrate why evaluation is important beyond just funder compliance, which of course is also important. The answers to the questions that we pose are not only of interest to the funders of the program, but they can also be used to improve the project's impact and decrease costs. Evaluation activities also include leading a process of reflection on the project's successes and key challenges, and then of course generating reports on the findings.

What is the purpose of evaluation?

SB: There are multiple reasons that we do evaluation. These include assessing to what extent project targets were met; analyzing the results, especially those that were underperformed and figuring out why they underperformed and what can be done to address that; examining possible reasons for the project results and outcomes, whether that be intended or unintended; asking and answering questions about the project's overall impact; determining whether the logic behind your project was sound in the first place, that there were no gaps in the logic; and informing decisions about the overall logic of the project.

Poll Questions

SB: We're going to do a couple of Slido questions as a knowledge check. You can either take out your phone and scan the QR code or you can go to slido.com and put in this number. To start with the first question,

Which is more useful for providing the information needed to make long-term modifications to a project—monitoring or evaluation?

SB: Seeing answers start to come in. Of course, the key word in this question is long-term. Yes, so the 72% so far... 75% have gotten it right. Evaluation is what's usually used to make long-term modifications to a project. Next question, please.

Which one occurs fewer times during the project cycle—monitoring or evaluation?

SB: Most people got this one right as well. Evaluation occurs fewer times during the project cycle, and the reason we know this is that evaluation really only happens towards the end of the phase of the project or at the end of the project as a whole, whereas monitoring happens on an ongoing basis. Thank you.

SB: Okay, so for this last knowledge check question,

You want to check whether you need to make short-term changes to your project, so you collect and analyze data on an ongoing basis and review that data. Is this better described as monitoring or evaluation?

SB: All right, yes, I think the key terms here were short-term and ongoing basis. So yes, it is monitoring. Great job, everyone.

2. Logic Models: A Brief Introduction to Theories of Change and Logical Frameworks

Logic Model

SB: So onto our next section, we're going to do a little introduction to some key logic models in the project design and monitoring and evaluation space, so specifically theories of change and logical frameworks. To monitor our project's progress and decide how to measure it or to be able to tell if we've achieved our outcomes or not, we need a documented plan of the project's goal and the steps that you're planning to take to achieve that goal. This is where logic models come in. Logic models are graphic representations that show us all the steps necessary to reach a goal.

Two Types of Logic Models: Theories of Change and Logframes

SB: There are two important types of logic models that we often talk about when we're discussing the project design in the monitoring and evaluation space. These are theories of change and logical frameworks, which we refer to as logframes.

SB: To start with the theory of change, it's a visual representation that highlights the causal pathway between activities, outputs, outcomes, and objectives. Of course, these specific building blocks could have different names, but these are usually the key components of a theory of change. I think it's important to emphasize here the causal pathway, meaning you should be able to look at a theory of change and see what is supposed to lead to what and how you're eventually going to get to your goal.

SB: A logframe, on the other hand, is actually usually in a table or matrix form, and it summarizes the key elements of your project strategy and is considered to be more of a project management tool. Your theory of change will actually inform your logframe, and both of them together will form the essential part of the infrastructure of your monitoring and evaluation plan.

SB: Let's look at an example of what these could look like visually. Both logic models can take various shapes, but their main building blocks largely remain the same. If you look at the theory of change at the bottom, you can see how the arrows show the causal pathway going from activities eventually to the goal. And then you can also see how those components of the theory of change are mapped onto the logframe, because you see the objectives, outcomes, outputs, and activities on the left just with additional information such as the description, indicators, means of verification of what your data source is going to be, and assumptions.

3. Evidence-Based Project Design: What is it, and why is it important?

SB: And now onto the main focus of today's webinar, which is evidence. Evidence is an essential part of developing a monitoring and evaluation system for your project. In our work, our main purpose is to positively impact the lives of the clients that we're working with. To achieve this goal, we want to make sure that the

services we're providing are in fact activities that have been proven to bring about positive change implemented with a certain logic.

What are evidence-based projects?

SB: So we come to this idea of an evidence-based project, which refers to when existing evidence has been used to inform the theory of change and the implementation of a project.

Evidence-Based Practice

SB: Next slide, please. Thank you. In general, three elements make up an evidence-based practice. A key piece is, of course, research evidence, so existing research that has proven that certain activities will lead to certain outcomes. And of course, that should be paired with practitioner expertise and experience, and client preferences and culture.

Examples of Evidence

SB: Examples of evidence can include meta-analyses, which analyze and synthesize data from multiple independent studies to provide a comprehensive understanding of the topic; systematic reviews and evidence summaries, which summarize key points from multiple evidence sources; impact evaluations, which assess the impact of the specific program or specific policy or intervention; and findings from previous cycles of your project, which of course can also include client feedback from previous cycles.

Evidence and Data in the Project Cycle

SB: To explain how evidence and data should be present throughout the life cycle of a project, we first want to look at the phases of a project design cycle. During preparation, which is the pre-design phase, which occurs before the cycle begins, a needs assessment is usually conducted. The needs assessment should be sensitive—sorry, can you go one back, please? Thank you. The needs assessment should be sensitive to the needs of different subpopulations based on gender, race, language, ethnicity, and any other relevant demographics.

SB: In the program design phase, you determine what the project aims to accomplish, understand stakeholder requirements, define the scope of the project, look into resource allocation, and create M&E systems to run your project.

SB: Then, in the planning phase or the startup phase, there is a risk assessment in the program. You do the allocation of resources and you determine the rules and responsibilities of different team members.

SB: After that comes implementation. The project is rolled out based on the plans that you've created in the previous stages, and monitoring—as decided in the M&E plan—also begins.

SB: And then the final phase is the end of project phase, which is the closing phase that involves the completion of the deliverables, the evaluation of the program, and documentation of lessons learned and results.

SB: Now let's think about how evidence and data come into play throughout the lifecycle of the project. First, in the design phase, this is where you would use evidence, existing data, and learning from projects to inform the project design and priorities. The needs assessment conducted during the preparation is also used to inform the project in this phase.

SB: Then, you plan and develop data collection and data management tools and then train staff on how to use them during the planning startup phase. In this phase, data quality assurance processes are also put in place.

SB: Then in implementation, you use data analysis to inform your programming. This is when you can conduct data reviews and consider whether short-term changes to your program are needed. So the ongoing monitoring is really key in this stage.

SB: And then finally, at the end of the project cycle, you'll be able to use the results of the data analysis for reporting purposes. You'll be able to assess your project's outcomes, and perhaps even its impact. This is essential to finding lessons learned and making long-term changes to a project that has several cycles or applying for a new cycle for a grant. Your findings are now then a form of evidence that will feed into that first phase of your project, which was design.

Why build an evidence-based project?

SB: And so let's talk about why it's important to build an evidence-based project. There are many reasons, a few of which we'll discuss here. First, this approach ensures that our services, when used as intended, will have the most effective outcomes as demonstrated by the research, and can therefore increase project success. Also, it'll ensure that the projects with demonstrated success will be more widely disseminated.

SB: Next, please. And that is closely tied to our responsibility with clients. So we're ensuring that successful projects are the ones that are getting disseminated widely. Also, it saves you time and gives you more confidence in your decision-making due to the evidence-based justification for your project.

SB: Then it helps meet many public and private funder requirements. Many funders require that your project be evidence-based and that you show the evidence backing your project. Relatedly, it optimizes the use and allocation of your resources. And then finally, it can mitigate risk associated with the project and avoid harm.

What are data-driven projects?

SB: Thank you. Relatedly, when we talk about evidence-based projects or evidence-informed projects, you might hear reference to data-driven projects. Data-driven projects are those where data is used to shape project design and inform decision-making during the life of a project. So data in this context could include findings from client feedback surveys, themes emerging from focus groups done with participants in the program, any other data that you're collecting for your project. Additionally, data on age, gender, language, other demographic indicators can be used to inform the project design so that it best meets the needs of the target population.

SB: Making a data-driven decision requires high-quality data or data that's complete, correct, consistent, and timely. So that's why that piece that we talked about earlier about ensuring data quality assurance processes and ensuring that the staff is trained on data collection tools is so important.

Discussion Question

SB: We're going to do another Slido question. This is one where you can type in your answers.

What is one type of evidence that can be used to inform project design?

SB: Client feedback, yes. Data, surveys, demographic information, client surveys, previous evaluations. Yes, those feed back into the project. Research studies, research, needs assessments, demographic data, yes. Interview data, qualitative feedback, more demographic data. Great, amazing. Thank you, all. All of these are important examples of evidence that can be used to inform project design.

4. Evidence Informing Project Design Decisions: A Walkthrough Example

Theoretical Case Study: Employment Program

SB: Great. Let's walk through a theoretical example to see how evidence can be used to inform project design decisions. To do this, to contextualize this information, we're going to use this case study. So let's say Mariam is a program manager at a community-based organization in Sacramento, California. She's developing an employment program at her organization and wants to ensure that it's informed by evidence.

Theory of Change

SB: This is the theory of change that she's working on for her project. Her project aims to contribute to refugee self-sufficiency by working to help refugees obtain full-time jobs earning a specific income within six months of their enrollment in her program. As you can see reading through this theory of change, she hopes to do this by providing job-readiness classes, and of course, her outputs are the successful completion of the job-readiness classes and then the skills that they've gained from those job-readiness classes.

Discussion Question

What is one reason that Mariam should ensure her program is evidence-based?

SB: Reduce the risk of harm, yes. Increase the project success so she isn't wasting time and resources, right? Looking at what's already been done and has been proven to be successful is very valuable. To be able to show funders so that when she's applying for funding, to make sure that she's meeting the needs of the community and the clients, to ensure, yes, that resources are used in an efficient manner, to have relevant and reproducible results. It's her responsibility to provide high-quality work for their clients, appropriate allocation of resources, ensuring that the program actually reaches its outcomes and its objectives.

SB: All of these are very much reasons that Mariam is trying to make sure that her program is evidence-based, right? And yes, efficiency. Thank you.

Research Evidence

SB: And so she takes a look at the different components of evidence that she wants to incorporate, and she wants to try to make use of all of these, starting with research. One place where you can find research relevant

to the resettlement space is the Switchboard website. She looks at the evidence summaries available on the Switchboard website, and she finds these two that seem to be relevant to her program. There's *What Strategies Improve the Outcomes of Refugee Women in Employment Programs?* and there's *What Strategies Enhance Career Development for Newcomers?* Like we mentioned earlier, evidence summaries summarize the outcomes of various, already-existing evidence.

SB: Let's take a closer look at some of these, starting with *What Strategies Enhance Career Development for Newcomers?* So when she was looking at this for the evidence summary, a few pieces of information stood out to her as being particularly relevant to her project. Next, please.

SB: First, that vocational training can contribute to workforce integration. Also that a focus on goal setting is not particularly useful for these kinds of programs. And then finally, that language training can contribute positively to the project outcomes. And so she's going to use this information to inform her theory of change by using the first two pieces of information to influence the curriculum of her project, and then that third piece of information to maybe add a language learning component to the job training program that she has.

SB: Now, to take a look at the other evidence summary, it also included information that could help keep her program gender-sensitive, specifically by informing her curriculum development. And so the piece that specifically stood out to her was ensuring that the curriculum focuses on entrepreneurship and gig work, because that's what's been proven as successfully helping open opportunities for women to engage in the workforce in non-traditional ways.

Theory of Change

SB: And so she took those pieces of information that she found from the evidence summaries and—next slide, please—decided to use that to inform her theory of change. So, specifically you can see that she added a language learning component to her program based on that first evidence summary that we looked at, adding the needed activities, output, and outcome at the bottom. You can see the adapting language learning curriculum, offering the classes, people successfully completing the classes and then passing the English language examination. She also used the rest of the feedback to inform the curricula use for this program—so, both the job readiness curriculum and the language learning curriculum—and ensuring that they do include a focus on entrepreneurship and don't focus on goal setting, for example.

Client Preferences: Needs Assessment

SB: Now, that was the research evidence. Now looking at client preferences, she decided to conduct a needs assessment and reached out to the client population that she's working with. The needs assessment included a survey and a focus group discussion. The outcomes of this needs assessment included that the clients said they would like Mariam's program to provide information about services in multiple formats and languages, provide a service phone number, basically like a hotline, walk-in times for clients who have more immediate needs, provide ways to leave feedback about client services at any time, and then provide transportation services. So to incorporate client preferences, Mariam decided to follow these recommendations, ensuring that her program is available in the needed languages, then adding a budget for transportation, and then of course expanding ways that clients can leave feedback.

Practitioner Expertise and Experience

SB: And then the third component of evidence-based practice that we discussed was practitioner experience and expertise. Mariam has worked in this field in previous roles before. An issue that she's seen come up in similar programs that she's worked on has been data quality. There have been issues and inconsistency in data collection with staff members collecting different types of data, not collecting all of the types of data that they're supposed to. And so that's something that she wants to address. Next slide, please.

Discussion Question

What could Mariam do to avoid having these data issues again? How could she learn from her previous experience?

SB: Data spot checks and training staff, creating a template for if questions are asked, adjusting data collection systems, ensuring staff is trained on data collection, monthly data Q&A, quality assurance, strong tracking and training staff. Okay, I think a lot of people are saying training staff. Actually... Next slide, please. Implementing standardized systems. Yes, perfect. Next slide, please.

Practitioner Expertise and Experience

SB: And so what she did decide to do is ensuring that there's a staff training on data collection tools early in the project design phase, so that the program staff are trained on the data collection tools before the start of the program. In that way she can ensure that she wouldn't run into the same problems with data quality as she did in her previous project. And of course, in addition to all the suggestions that you all provided with checks and of course a monthly quality issue.

Evidence-Based Practice

SB: So that way she used all three types of evidence to inform her project's design. The research evidence was her taking a look at the evidence summaries and then pulling what existing research has told her about working in this space and using that to inform the theory of change for her program, which of course will then inform the whole rest of the project. She took a look at client preferences and culture by doing that needs assessment, having focus group discussions with clients, doing surveys, and then incorporating everything that the clients express that they need into that project. That helps make sure that you actually are meeting the client's needs. And then of course, her expertise and experience working in this space before helped her make sure that she's avoiding issues before they come up because she's already seen them before.

Feedback Survey

SB: Before we move on to the Q&A and before we move on to recommended resources, I just wanted to pause here for our survey. This survey is extremely important to help us improve future trainings. Our survey is five questions long and only takes 60 seconds to complete. It's just been sent in the chat, and also you can scan the QR code with your phone. We're just going to give it a minute for people to answer the survey and then we'll move on to Q&A.

Q&A

SB: All right, thank you, everyone. I think we can move on to the Q&A. All right, so let me take a look at some of the questions that have been asked in the Q&A section. Okay, so one question we've gotten is,

Can evidence also inform the logframe? If yes, in what ways?

SB: The way we talked about evidence, the way we clearly outlined it is how it informs the theory of change. What we can also remember is that the theory of change then informs the logframe, right? So for example, in the example that we gave with Mariam's project, she ended up adding the language learning component that wasn't there in her program before. So that language learning component is then going to be added to the logframe in the set of relevant activities and outputs and outcomes. And then of course, you're going to have to think about the relevant indicators. So are you going to track how many participants are in that language learning component? How many participants actually successfully completed, for example?

SB: Another way that evidence can be really important when you're looking at the logframe is we mentioned that the logframe includes means of verification. So that's the data source and indicators, which is how you're measuring the success of your project. A lot of times, if you're unsure of how to measure something, you can look at what already-validated measures of success have already been out there. Those are evidence-based surveys, for example. Maybe you don't have an idea of what questions you should ask to measure workplace happiness or to measure the satisfaction with a specific program or something like that. You can look at what already exists out there and then use that to inform the indicators that you'll be using.

SB: Just want to look at any of the others... Okay, so there's a question about if the implementation of an evidence-based project requires the incorporation of every component outlined within an existing evidence-based theory or program.

If an evidence-based program for newcomers includes a language learning curriculum, employment research, et cetera, does deviating from incorporating all components invalidate the program's evidence-based status?

SB: That's a really good question. I honestly wonder. I think one thing that would be worth looking into for this is that there does seem to be a difference between evidence-based and evidence-informed. I think it might be worth noting here.

SB: Sorry, I think I lost it. Yeah, so it's worth noting here that of course deviating from a program like that might mean that you won't end up with the same results. So I think that's something that you would have to include in a narrative if you're including in a proposal. If you are mentioning that you're using existing evidence, you would have to mention how you're adapting it, right? Because adapting existing evidence does make sense, but then you do run the risk of it not resulting in the same outcomes. We do have a resource on implementation science on Switchboard that we can include in the shared resources after this. Let me just make a note so I don't forget.

SB: Let me see what other questions... Okay, so we have a question that asks,

[Do you] have any templates for planning a theory of change for a project?

SB: And yes we do actually. Let me also make a note to include those. We do have existing templates that you can use for a theory of change and for a logframe actually. You can use those. We have this entire tool that helps you set up the basic skeleton of a monitoring and evaluation plan. So let me just write a note on that as well.

SB: So there's a question about,

[Does] Switchboard offer any data collection analysis trainings for service providers?

SB: Well, I guess one thing that immediately comes to mind at least is you can reach out through Switchboard's website because we are a training and technical assistance provider. You can go to the section of the website that is called technical assistance, and you can fill out a form there with a specific ask about data collection. And we can then, of course, set up a time to meet with you or share resources. And of course, there is the whole resource library. We don't currently have any scheduled training specifically on data collection, but that is something that we can definitely discuss if you reach out with a technical assistance request.

SB: Okay, so someone actually put in the Q&A just a note. This person is a former funder. They just wanted us to mention that if there are gaps in evidence that would assume to be in your proposal, so for example, maybe someone hasn't done this before and so there is a gap in the evidence, you shouldn't shy away from mentioning that. That's something that you can reach out to the funder to discuss. Thank you for sharing that.

SB: There's a question about,

[How do we find] meta-analysis and literature reviews?

SB: Of course, we did mention the Switchboard website. You can always use other places where you can search for existing literature. The usual, even something like Google Scholar, just looking up the type of program that you're interested in and seeing what research already exists out there could be done. And then those sources sometimes also include already-existing meta-analysis and literature reviews that have maybe compiled the results of various examples of research. The examples of research that you can find on the Switchboard website, there is published research from existing evidence, like other providers. But I also really like to use the evidence summary section because that does include summaries on a specific topic of the already-existing research and evidence that's out there. So those are really valuable for key takeaways from those research studies that you don't want to go through and read each one of them.

SB: There's a question about slides. I wanted to mention the... Oh yeah, actually, my colleague is typing an answer to that. We will be sharing the recording both in the email that you'll receive and also on the Switchboard website. And then we'll also be sharing a transcript of the webinar on the Switchboard website. All right.

SB: We also have a really valuable question, I think, about the role of innovation and new ideas:

[Is it] recommended that we stick to evidence-based strategies for clients?

SB: I think what we're talking about when it comes to adapting already-existing projects is really important to consider because you can incorporate new ideas and innovate while also still being informed by existing

evidence. And then of course, like we discussed, this is something that you can mention. You can say, "This hasn't been done before," but also you needing to acknowledge that there are risks associated with that, maybe unintended outcomes or unintended harm even. But then of course, after you do a project like that, the outcomes of your project could then also become evidence that you can use to say that we have done this and if it's successful. So that would be, I think, a conversation worth having with any funders that you're working with or any other ethical review boards or anything like that.

SB: All right, I think we can move on to the review of the learning objectives and an overview of recommended resources.

Conclusion

Reviewing Learning Objectives

SB: All right, so just to recap what we've discussed in this webinar, we first learned how to define key terms related to M&E and project design, distinguish between two logic models, specifically theories of change and logframes, explain the importance of evidence-informed project design in the refugee resettlement space, and determine how various types of evidence can inform project design decisions.

Recommended Resources

SB: And so we have this list of recommended resources, including a tip sheet on developing data-driven evidence-based programs, a blog post that's talking about if your programs are evidence-based, and a webinar that was introducing the Switchboard evidence database. I'll, of course, add to these the ones that we discussed earlier, for example, the template for how to create a theory of change and logframe and the implementation science resource that we have.

Stay Connected

SB: I want to thank you all for joining us today. Here are some ways to stay connected with Switchboard. I look forward to having you join us in future trainings. Thank you.

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