

Pathways to Proportionate Impact Evaluation

SRA – NERC 1st course: 26 January 2022

The course provides an opportunity to (better) understand the (many) different options and choices open to for fitting impact evaluation methodologies to different needs and circumstances of policy and interventions. The intensive course will prepare participants to:

- Be aware of a range of options and methodological choices which can be applied to different impact evaluation circumstances and needs.
- Recognise the different methods of impact evaluation, and their uses, including for piloting, scaling-up and roll-out of programmes and initiatives.
- Understand how to manage policy partner and others' expectations to unpick both explicit and implicit needs, and better focus and position chosen approaches.
- Appreciate the how 'counterfactual' evidence can be built proportionately into fully experimental (control), quasi experimental and 'constrained' (comparator) designs.
- Recognise the role and relevance of 'non-experimental' (alternative) impact evaluation methods including an brief introduction to 'theory-based evaluation'.

By the end of the course, participants who have with a basic understanding of evaluation and research methods will have been introduced to the contrasts between control, addressing different comparator and non-experimental options to providing for impact evaluation in different programme and policy circumstances. They will better understand 'Magenta' (and other) guidance and have increased confidence to specify and manage commissioned impact evaluations and to manage or contribute to internal evaluations.

Course schedule: The course is organised in a one-day intensive 'Zoom' format as below.

Pathways to proportionate impact Evaluation (Online): Timetable

Time	Activity/session
09.20+	Join Zoom 'waiting room' for Part 1
09.30-10.30	Module 1: Welcome and Introductions <ul style="list-style-type: none">• Introduction to course• Distinctiveness of impact evaluation - other types' of evaluation; Outputs-outcomes and impacts;• Why do we do it?
10.30-11.15	Module 2: Managing for realistic expectations of impact evaluation <ul style="list-style-type: none">• Challenges of unrealistic expectations, managing for clarity & realism• Four step process to purposing (pitfalls to avoid); cascading to goals/objectives• Introduction to ROTUR framework guide for clarifying purpose.• Q & A; 1st plenary discussion
11.15-11.30	SHORT BREAK
11.30-12.15	EXERCISE 1 (11.30-12.00); feedback and discussions (12.00-12.15)
12.15-13.15	Module 3: Getting to grips with the intangible <ul style="list-style-type: none">• Tackling 'whole impact' measurement• Chasing the counterfactual; experimental and non experimental pathways• Counterfactual and causality: applying the counterfactual in different causal circumstances

	<ul style="list-style-type: none"> • Introduction to the 4 counterfactual toolkits. • Q & A; 2nd plenary
13.15-14.00	LUNCH BREAK
14.00-14.45	Module 4.1 (Toolkit 1): Fully experimental methods <ul style="list-style-type: none"> • Introducing individual and cluster RCTs and ‘control’ methods • Pros and cons of RCTs; and best fit Module 4.2 (Toolkit 2): Quasi experimental designs (QED) <ul style="list-style-type: none"> • Uses of ‘selected comparators’ and ‘natural experiments through QED • Introduction of QED approaches and best fit • Pitfalls to avoid; pros and cons of QED
14.45-15.10	Module 5 (Toolkit 3): Constrained ‘experimental’ designs <ul style="list-style-type: none"> • Non-selected comparisons and estimation of the counterfactual • Pros and cons for (different) constrained designs; Pitfalls to avoid • Q & A; 3rd Plenary
15.10-15.25	SHORT BREAK
15.25-16.00	EXERCISE 2 (15.25-15.50); feedback and discussions (15.50-16.00)
16.00-16.40	Module 6 (Toolkit 4): Non-experimental (Alt-E) approaches <ul style="list-style-type: none"> • Assessing the counterfactual; brief introduction to theory-based, configurational and adaptive approaches • Analysis options for (non-experimental) assessment of the counterfactual • Pros and cons for non-experimental methods; Pitfalls to avoid • Q & A. <i>NB. Course 2 focuses wholly on Alt-E approaches for evaluating in complex contexts.</i>
16.40-16.45	<ul style="list-style-type: none"> • Available guidance and selected reading • Recap
16.45	Close of course

Course tutor: The course will be led by Professor David Parsons who is a long-standing evaluation specialist, consultant and ‘peer’ trainer with many years’ experience of advising government departments, agencies, regulators and charitable trusts on evaluation. A practising evaluator, in the last two decades he has led over 50 independent evaluations of policy and programmes using a wide range of counterfactual approaches. This has included working with policy, insight and analytical teams in seven government departments, various non-departmental agencies, devolved administrations, and for international bodies including the European Commission, International Labour Organisation, OECD and others. He is a recognised authority on cross-conceptual approaches to evaluation applied in complex settings. David leads the Social Research Association (SRA) course programme for practitioner evaluation training, and among other publications is author of *Demystifying Evaluation*, Policy Press, 2017) and a number of guidebooks on evaluation design.