

BetterEvaluation Taxonomy Concept

One of the benefits BetterEvaluation provides is a structured process to help users match methods to their evaluation situation. Rather than presenting the user with a long list of method, the website leads users through a process identifying the evaluation task that they are engaged in or planning and suggests methods suitable for that task. The task-oriented taxonomy is a key feature of the BetterEvaluation concept and has been designed from the users' perspective to simplify the decision making process.

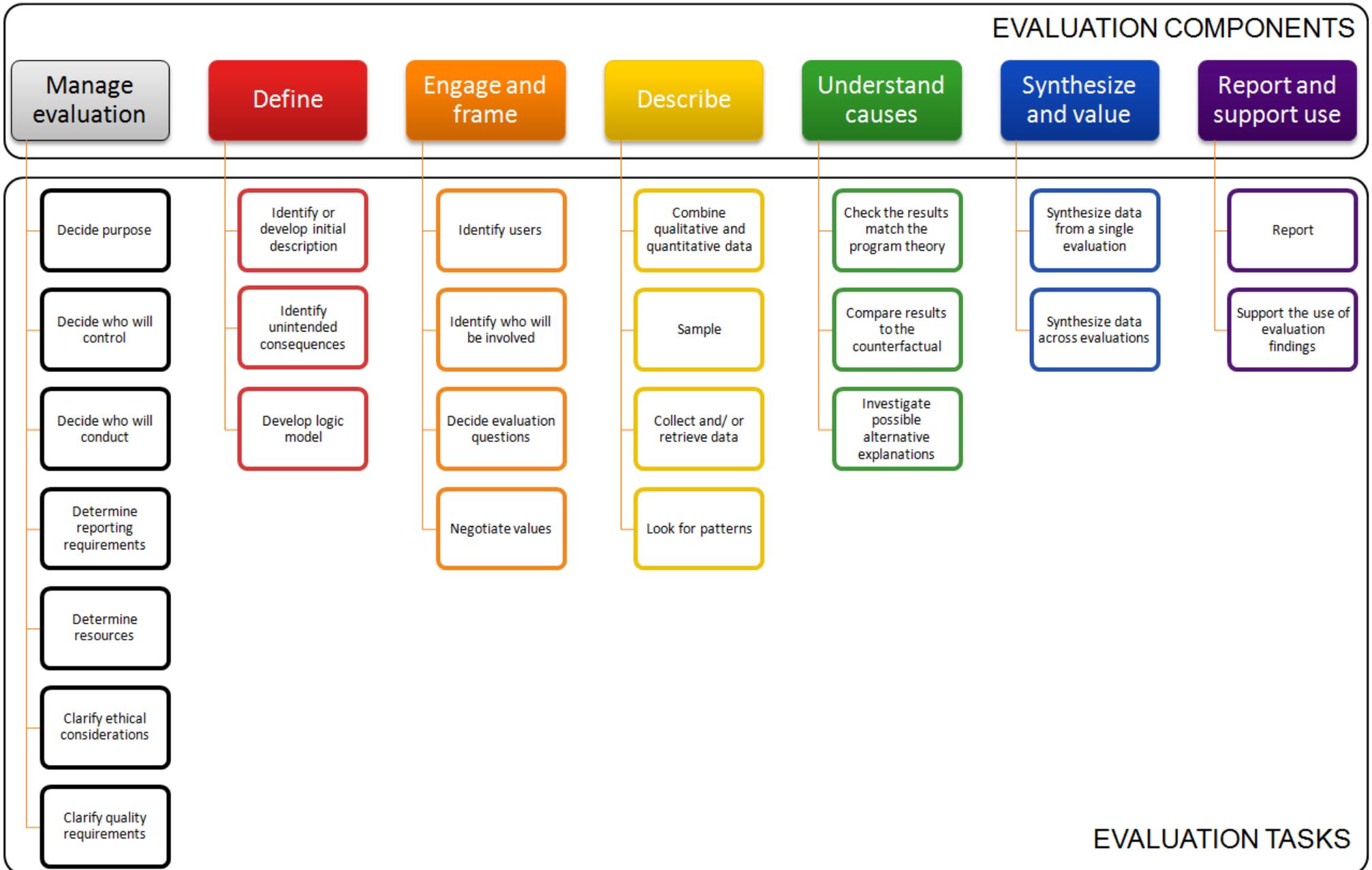
As well as methods being grouped by task, the tasks themselves are grouped into seven *evaluation components* which relate to different aspects of evaluation which need to be considered when deciding methods. The seven evaluation components defined by BetterEvaluation are:

- 1) **Manage**: Determine the purpose of the evaluation, including who will conduct the evaluation and how it will be conducted. Tasks include decide purpose, decide who will control, decide who will conduct, determine reporting requirements, determine resources, clarify ethical considerations and clarify quality requirements.
- 2) **Define**: Develop or source an initial description of what is to be evaluated. Tasks include identify or develop initial description, identify unintended consequences and develop logic model.
- 3) **Engage and Frame**: Identify who needs to be involved in the decision making about the evaluation and engage these groups in the process of framing the evaluation. Tasks include identify who will be involved, decide users, decide evaluation questions and negotiate values.
- 4) **Describe**: Collect and retrieve data to answer evaluation questions about the activities of the project/program/policy, the various results it has had, and the context in which it has been implemented. Tasks include combine qualitative and quantitative data, sample, collect and/or retrieve data and look for patterns.
- 5) **Understand Causes**: Analyze what has been produced the outcomes and impacts you have observed. Tasks include check the results match the program theory, compare results to the counterfactual and investigate possible alternative explanations.
- 6) **Synthesize and Value**: Determine how data will be combined to form an overall assessment of merit or worth of the intervention. Tasks include synthesize data from a single evaluation and synthesize data across evaluations.
- 7) **Report and Support Use**: Present findings in ways that are useful for the intended users of the evaluation, and support them to make use of them. Tasks include report and support the use of evaluation findings.

The following schema is a visual representation of the seven components and their tasks. Detailed descriptions of each task follows, including an example method to whet your appetite.



EVALUATION COMPONENTS



EVALUATION TASKS

To understand what we mean by the tasks, we present below the planning questions that relate to each task.

1. MANAGE: Determine the purpose of the evaluation, including who will conduct the evaluation and how it will be conducted.

Task	Key planning questions
Decide purpose	What is the purpose of the evaluation?
Decide who will control	Who will control key decisions on the design and implementation (<i>who will be involved, what methods will be used, how will findings be shared</i>)?
Decide who will conduct	Who will conduct evaluation tasks (<i>internal staff, external consultants, community members</i>)?
Determine reporting requirements	What are the reporting requirements?
Determine resources	What resources are available (<i>staff time, external funding, expertise</i>)?
Clarify ethical considerations	What are the key ethical considerations? What ethical issues might arise in your evaluation? How can you anticipate them? What should you do about them?
Clarify quality requirements	How will you determine the quality of the evaluation?

Example method: Decide who will conduct > [Positive Deviance](#)

2. DEFINE: Develop or source an initial description of what is to be evaluated.

Task	Key planning questions
Identify or develop initial description	How can you develop a brief description of the project?
Identify unintended consequences	How might you identify unintended outcomes and impacts?
Develop logic model	How will a logic model be developed?

Example method: Develop logic model > [Participatory impact pathway analysis](#)

3. ENGAGE and FRAME: Identify who needs to be involved in the decision making about the evaluation and engage these groups in the process of framing the evaluation.

Task	Key planning questions
Identify users	Who are the intended users of the findings?
Identify who will be involved	Who needs to be involved in the evaluation (<i>will the same people manage, conduct and use the findings or are there subgroups</i>)?
Decide evaluation questions	What are the key questions the evaluation needs to answer?
Negotiate values	What are the values that will underpin the evaluation – in terms of impacts, processes and distribution of costs and benefits?

Example method: Negotiate values > [Coexistent model of evaluation](#)

4. DESCRIBE: Collect and retrieve data to answer evaluation questions about the activities of the project/program/policy, the various results it has had, and the context in which it has been implemented.

Task	Key planning questions
Combine qualitative and quantitative data	How will you combine qualitative and quantitative data?
Sample	How will you sample (<i>probability, purposive or accidental</i>)? How will you determine and justify your sampling strategy?
Collect and/ or retrieve data	How will you collect and/ or retrieve data (<i>individuals, groups, observation, physical measurement, existing documents and data</i>)?
Look for patterns	How will you look for patterns in the data?

Example method: Look for patterns > [Tableau visualization software](#)

5. UNDERSTAND CAUSES: Analyze what has been produced the outcomes and impacts you have observed.

Task	Key planning questions
Check the results match the program theory	How will you check whether or not the results match the program theory?
Compare results to the counterfactual	How will you analyze the counterfactual (<i>using experimental, quasi-experimental or non-experimental methods</i>)?
Investigate possible alternative explanations	How will you investigate alternative and complementary explanations (<i>examining multiple influences and contributions, alternative explanations or integrated approaches</i>)?

Example method: Compare results to the counterfactual > [Propensity scores](#)

6. SYNTHESISE AND VALUE: Determine how data will be combined to form an overall assessment of merit or worth of the intervention.

Task	Key planning questions
Synthesize data from a single evaluation	How will you synthesize data from a single evaluation (for example, through <i>numeric weighting, qualitative weight and sum, cost benefit analysis, cost effectiveness analysis, cost utility analysis...</i>)?
Synthesize data across evaluations	Do you need to synthesize data across evaluations? If so, how (for example, through <i>comparative ranking, meta-analysis, vote counting, cost-utility analysis, realist synthesis...</i>)?

Example method: Synthesize data across evaluations > [Realist synthesis](#)

7. REPORT AND SUPPORT USE: Present findings in ways that are useful for the intended users of the evaluation, and support them to make use of them.

Task	Key planning questions
Report	How should the evaluation results be reported? Are different methods needed for different intended users?
Support the use of evaluation findings	How will you support the use of evaluation findings?

Example method: Report > [Chunking](#)