

# IDEAS Facilitators' Guide

Innovating, Designing,  
Evaluating and Applying  
to Small-scale media and  
communication projects

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## Acknowledgements

Many people and organisations have generously contributed to the creation of the *IDEAS Facilitators' Guide*, which accompanies the *IDEAS Guide*. This includes feedback, workshop support and suggestions from the following organisations and individuals:

ABC ID: Domenic Friguglietti, Vipul Khosla, Angela Davis and Kate Raseta.

PACMAS: Francis Herman, Talita Tu'ipulotu and Wilson Toa.

The Centre for Social and Creative Media at the University of Goroka and participants of the Goroka Workshop (July 2014).

Further Arts and participants of the Vanuatu Workshop (December 2015).

Research assistants: Samantha Ryan and Mark Eby.

Editing and layout: Erin Byrne-Gurung.

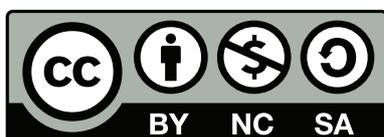
This guide draws upon resources and guidance from the BetterEvaluation website. It is informed by *Evaluating Communication for Development: A framework for social change* by June Lennie and Jo Tacchi (2013). It also draws upon research on media development carried out by Jessica Noske-Turner (thesis title: *Navigating theory, negotiating difference and beating the system: a critical how-to of media assistance evaluation*; forthcoming book, under contract with Palgrave Macmillan). Other references are footnoted.

Funding for the *IDEAS Guide* and the *IDEAS Facilitators' Guide* is provided through an Australian Research Council Linkage Project Grant (LP120200705), titled 'Mobilising Media for Sustainable Outcomes in the Pacific Region', in partnership with ABC International Development.

Suggested citation: Noske-Turner, J., Horst, H. and Tacchi, J. (2016). *IDEAS Facilitators' Guide*. RMIT University.

### Feedback

Do you have any useful feedback for us to learn how to better improve this guide? Please email us at [j.nosketurner@gmail.com](mailto:j.nosketurner@gmail.com) or [heather.horst@gmail.com](mailto:heather.horst@gmail.com).



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## Overview of the *IDEAS Facilitators' Guide*

### What is this guide for?

The *IDEAS Facilitators' Guide* provides briefing notes on how you, as a facilitator, can support small-grant recipients to use the *IDEAS Guide* to clarify their project design, and to plan and manage their evaluation. The *Facilitators' Guide* is best used in conjunction with the *IDEAS Guide*. These guides are designed to be used together in the planning and implementation of a workshop. Facilitators can also adapt the steps to suit the mode and length of delivery.

### Why was it developed?

The *Facilitators' Guide* was developed to accompany the *IDEAS Guide* to help facilitators to effectively support capacity development for individuals working in grassroots and community organisations who might have little or no experience of evaluation. It may also be helpful for more experienced practitioners. The approach integrates evaluation into the design of projects. The *IDEAS Guide* and the *Facilitators' Guide* were developed in the context of a specific program (the PACMAS Innovation Fund) in the Pacific; however, we hope that the guides can be adapted for use beyond this original context.

### Who and what is a facilitator?

The role of facilitator is an important one. Facilitators are observers, listeners, negotiators, supporters and coaches. We might think of facilitators as people who can help workshop participants by asking more detailed questions about their ideas. Facilitators might assist them in understanding different perspectives and ways of thinking about a challenge or a goal. Facilitators are not experts; instead, their key role is to draw out the expertise that exists among participants.

In the context of a small grant or innovation fund, facilitators will usually be part of the managing or funding organisation. They may have a specific role in supporting capacity development, a role in monitoring and evaluation, or any other position with an interest in assisting the recipients of funds to manage their own project design and evaluation.

### Sailing as a metaphor for learning-based evaluation

We have used a metaphor of sailing throughout the *IDEAS Guide*, which was suggested to us by one of the practitioners we consulted while developing the *IDEAS Guide*.

The sailing metaphor, and the idea of a learning path or journey, is used throughout the guide to tie together the modules with a sense of purpose, and to provide an easy way to understand progress through what can be a challenging topic. Asking participants to define the kind of learning journey they are on in the beginning will help practitioners to critically engage in thinking about their practice, and about what they want to know from their stakeholders and communities. They will continue working with these questions and ideas throughout the workshop.

The sailing metaphor is useful for thinking about how to respond to the uncertainty associated with innovative projects, and the importance of adaptability in terms of how organisations and individuals navigate getting to their stated goal. Evaluation can help with making sense of



information about what is and isn't working, and with identifying what unexpected challenges or impacts are emerging, to enable practitioners to adapt their practice during the project.

## Purpose of the workshop

The *Facilitators' Guide* is designed to support facilitators to organise and run a workshop for project teams. The *IDEAS Guide* itself is designed to cater for a range of different skill levels and familiarity with evaluation. It is ideal for project managers and team members responsible for reporting and evaluation, as well as any other participants who are interested in evaluation, to participate in the workshop together. Ideally, participants would come to the workshop with a new or early-stage project to develop during the workshop, which they could present and discuss when they return to their organisation. By the end of the workshop, participants should have a revised project design, and a draft monitoring and evaluation plan.

## Overview of the *IDEAS Guide* modules

The *IDEAS Guide* includes 10 modules<sup>1</sup> and is divided into 2 parts. The modules in part 1 focus on clarifying the design and approach of the project. This sets the foundation for part 2, which focuses on the design of the evaluation. Although the activities are sequential and designed to build upon each other, you may wish to adapt the order to suit the workshop participants' purposes<sup>2</sup>.

Guide module	Purpose
Introduction to the <i>IDEAS Guide</i>	The purpose of the introduction is to provide participants with an overview of the workshop, to introduce the <i>IDEAS Guide</i> , and to establish an open and trusting group dynamic.
<b>PART 1</b>	
Module 1: Understanding the role of evaluation and learning in innovation	Module 1 frames evaluation as continual learning. The purpose is to introduce the concept of learning-based evaluation, emphasising how evaluation can help project teams and other stakeholders to learn about what's working and how they can improve the project.
Module 2: Defining your project goals and priorities	The purpose of module 2 is to articulate the aims of the project, and to clarify the underlying approaches. Having a clearly defined project is a foundational part of planning learning and evaluation.
Module 3: Understanding the people connected to the project (stakeholders)	The purpose of module 3 is to identify all project stakeholders. Participants will create a map of the people and groups connected to the project, and identify their interests. The stakeholder map is built-on in later sections.
Module 4: Stakeholder participation and communication	The purpose of module 4 is to consider how best to communicate and engage with different stakeholders, and how to incorporate different kinds of expertise. The module encourages participatory modes of engagement with a range of stakeholders.

1. The modules draw upon the Rainbow Framework. To learn more see [BetterEvaluation.org](http://BetterEvaluation.org).

2. The principles of evaluation are presented in *Evaluating Communication for Development* by June Lennie & Jo Tacchi (2013).



Module 5: Doing the right thing by the people involved with the project (ethics)	Module 5 explores potential ethical issues and risks in communication projects. The purpose is to prompt reflection on these issues, to locate ethics within the cultural context, and to start developing strategies for preventing risks.
PART 2	
Module 6: Planning data-use	Module 6 focuses on data-use, and works towards creating a data-use calendar. The purpose is to identify points in the project timeline when data could be used to inform improvements in order to support a learning-based approach.
Module 7: Asking the right questions	The purpose of module 7 is to develop key evaluation questions that state clearly what project teams and stakeholders need to know about the implementation of the project. These should correspond with the identified project goals and project components.
Module 8: Planning information and data collection	The purpose of module 8 is to select data collection methods that are realistic and that will provide good information in order to answer the key evaluation questions.
Module 9: Making sense of data	The purpose of module 9 is to demystify data analysis, and to provide strategies for making sense of data and patterns.
Module 10: Reporting and sharing	The purpose of module 10 is to explore options for both traditional and non-traditional ways of reporting and sharing findings.

Table 1. Structure of the *IDEAS Guide*.



## Preparing to facilitate a workshop

We recommend that the information and activities in the *IDEAS Guide* be facilitated through a workshop. This allows facilitators to actively support participants through the process. A possible structure and schedule for a two-and-a-half day workshop, which is the shortest workshop length for comfortable delivery of the full *IDEAS Guide*, is included on page 8. This can be adapted to suit; in many ways, more and shorter sessions would be better where possible.

Ideally, participants should be working directly on a current project as they go along. It is often useful to begin with an early-stage or recently-funded project so that the workshop is directly useful to their work.

The optimum workshop group size is usually 10-15 people. The participants should include key members of the grant-recipient project teams, especially those responsible for project implementation, evaluation and reporting. It's best to include as many team members as possible. You might also consider inviting other stakeholders involved in project implementation and evaluation where possible, as a broad range of perspectives can be valuable.

For a workshop of this size, it works well to have up to four facilitators to ensure they can work effectively with small groups. Former fund recipients can make great facilitators, as their experiences are often invaluable for participants just starting out on their own journeys.

Facilitating such a diverse group requires a careful attention to group dynamics, which we identify at different stages of the *Facilitators' Guide*. Since this guide is designed to facilitate interactive and applied learning, it is important that all participants are able to contribute and be heard. As a facilitator, it is important to be aware of factors such as gender, age, position, seniority, disability and other differences, and how these might influence group participation. Use group-work times to observe group interactions. Be prepared to intervene to increase the inclusion of quieter people, perhaps by changing the group arrangement, sitting with groups and facilitating, or by directly stating that all participants should have a chance to speak.

Although the sequence of modules has been designed to offer a logical progression from planning through to analysis, you and the project teams can adapt the order to suit your purposes. Each module begins with a summary and a list of materials required (see the preparation checklist). There are also notes with suggestions of questions that you, as a facilitator, might raise with project teams at appropriate times. Icebreakers can be used any time there is a drop in energy. Suggested icebreakers are included in appendix 3.

It is important to keep in mind local and culturally-appropriate forms of convening meetings. For example, in the Pacific it is common to offer prayers or blessings at the beginning of workshops and meals. There may be other culturally-appropriate observances to consider. Asking one of the participants if they are comfortable to lead a prayer at these times is very common. You may also wish to lead one or two of these observances as the facilitator.

A PowerPoint file with workshop slides has been created to support facilitators. It is included as a companion file to the *IDEAS Facilitators' Guide* at [http://betterevaluation.org/resources/guide/IDEAS\\_Guide](http://betterevaluation.org/resources/guide/IDEAS_Guide) (see appendix 1 for details). If the PowerPoint will be used during the workshop, facilitators are encouraged to adapt it to suit. Guidance on the use of slides is included throughout the *Facilitators' Guide*.

## Structuring the workshop: A sample schedule

Module	Time	Content	Mins
<b>Day 1</b>			
	9:00	Official start time: Welcome people as they arrive.	15
<b>Introduction</b>	9:15	<b>Presentation:</b> Introduction of facilitators Introduction, housekeeping.	5
	9:20	<b>Facilitation:</b> Introductions by participants Personal introductions, introductions of projects.	10
	9:30	<b>Activity:</b> Icebreaker	15
	9:45	<b>Facilitation or activity:</b> Workshop guidelines	5
	9:50	<b>Presentation:</b> Workshop schedule	5
		<i>(Optional activity: Expected outcomes)</i>	<i>(+5)</i>
	9:55	<b>Presentation:</b> Overview of the <i>IDEAS Guide</i> Covering the objectives.	5
<b>Module 1</b>	10:00	<b>Presentation:</b> Introduction to module 1: Understanding the role of evaluation and learning in innovation	10
	10:10	<b>Activity 1:</b> Understanding which type of course you are travelling Group activity using a spectrum on paper or creating a physical line in the room.	20
	10:30	<b>Activity 2:</b> Considering the type of evaluation that matches your learning pathways Small group activity to reflect on the learning pathways and implications.	20
	10:50	<b>Presentation and facilitation:</b> Differences between common thinking about evaluation and the <i>IDEAS Guide</i> evaluation approach	10
	11:00	<b>Facilitation:</b> Wrap up	5
	11:05	<b>Morning tea</b>	15
<b>Module 2</b>	11:20	<b>Presentation:</b> Introduction to module 2: Defining your project goals and priorities	10



	11:30	<b>Activity 1:</b> What are you trying to do? Statements about future change.	20
	11:50	<b>Activity 2:</b> How are you trying to do it? Group sorting and ranking to understand components.	45
	12:35	<b>Facilitation:</b> Wrap up	10
	12:45	<b>Lunch</b>	30
<b>Module 3</b>	1:15	<b>Presentation:</b> Introduction to module 3: Understanding the people connected to the project (stakeholders)	10
	1:25	<b>Activity:</b> Stakeholder mapping In small groups create a map of stakeholders.	30
	1:55	<b>Facilitation:</b> Wrap up	10
<b>Module 4</b>	2:05	<b>Presentation:</b> Introduction to module 4: Stakeholder participation and communication	10
	2:15	<b>Facilitation:</b> Engaging different kinds of expertise, and culture and customs	10
	2:25	<b>Activity:</b> Thinking about your engagement and communication styles Building on the stakeholder map to clarify the appropriate ways to communicate with stakeholders.	30
	2:55	<b>Facilitation:</b> Wrap up	10
	3:05	<b>Afternoon tea</b>	15
<b>Module 5</b>	3:20	<b>Presentation:</b> Introduction to module 5: Doing the right thing by the people involved with the project (ethics)	15
	3:35	<b>Activity 1:</b> Risks in media and communication projects Discussing ethics in relation to a series of examples.	30
	4:05	<b>Activity 2:</b> Considering your own project's ethical risks Group work on potential ethical risks.	30
	4:35	<b>Facilitation:</b> Wrap up (Note: There is a 15-minute buffer in case of running late.)	10
	5:00	<b>Finish day 1</b>	



**Day 2**

	9:00	Official start time (Ideally you should start on time, especially if punctuality was discussed during expectations and workshop guidelines on day 1. However, the schedule allows for an extra 5 minutes.)	
	9:05	<b>Facilitation:</b> Welcome back, recap of day 1 Sharing of one key thing that stood out from day 1. <b>Presentation:</b> Introduction to day 2, introduction of the concept of 'data'	15
<b>Module 6</b>	9:20	<b>Presentation:</b> Introduction to module 6: Planning data-use	10
	9:30	<b>Activity 1:</b> Uses and users of evaluation data	10
	9:40	<b>Presentation:</b> Introduction to the data-use calendar	10
	9:50	<b>Activity 2:</b> Data-use calendar	30
	10:20	<b>Presentation:</b> Introduction to the learning loop	5
	10:25	<b>Facilitation:</b> Wrap up	10
	10:35	<b>Morning tea</b>	15
<b>Module 7</b>	10:50	<b>Presentation:</b> Introduction to module 7: Asking the right questions	10
	11:00	<b>Activity 1:</b> Thinking again about the uses and users of evaluation	5
	11:05	<b>Activity 2:</b> Specifying the key evaluation questions	30
	11.35	<b>Facilitation:</b> Wrap up	10
<b>Module 8</b>	11:45	<b>Presentation:</b> Introduction to module 8: Planning information and data collection	5
	11:50	<b>Presentation:</b> Tracking project activities and achievements ('monitoring')	5
	11:55	<b>Activity 1:</b> Creating a monitoring plan Groups create a monitoring plan using the template provided.	15
	12:10	<b>Presentation:</b> Capturing the unexpected	5
	12:15	<b>Activity 2:</b> Choosing evaluation methods using methods cards Groups match methods to key questions.	30



	12:45	<b>Lunch</b>	30
	1:15	<b>Facilitation:</b> Discussion of ethics in data collection and evaluation	15
	1:30	<b>Activity 3:</b> Compiling an evaluation plan Groups transfer decisions made into the matrix provided.	20
	1:50	<b>Facilitation:</b> Wrap up	10
<b>Module 9</b>	2:00	<b>Presentation:</b> Introduction to module 9: Making sense of data	5
	2:05	<b>Facilitation:</b> Managing data	5
	2:10	<b>Presentation:</b> Making sense of data	5
	2:15	<b>Activity:</b> Workshop evaluation Completing a workshop evaluation questionnaire.	20
	2:35	<b>Activity:</b> Analysing workshop evaluation data Analysing questionnaire responses as a group.	30
	3:05	<b>Activity:</b> Creating a data management and analysis plan	10
	3:15	<b>Facilitation:</b> Wrap up	10
	3:25	<b>Afternoon tea</b>	15
<b>Module 10</b>	3:40	<b>Presentation:</b> Introduction to module 10: Reporting and sharing	10
	3:50	<b>Presentation and facilitation:</b> Traditional and innovative reporting options	5
	3:55	<b>Activity:</b> Choosing reporting options using reporting cards Groups go through and decide which options they would like to use.	25
	4:20	<b>Facilitation:</b> Wrap up	10
<b>Conclusion</b>	4:30	<b>Facilitation:</b> Reflection on key insights and wrap up (Note: There is a 15-minute buffer in case of running late.)	15
	5:00	<b>Finish day 2</b>	
<b>Day 3</b>			
	9:00 - 12:30	Finalising evaluation plans. Appointments with facilitators.	

# Preparation for workshop: A checklist

## Printing

- *IDEAS Guide*:
  - One copy per participant.
  - Printing instructions: A4, double-sided, colour printing (black and white printing may also be manageable if this is the only option; however, pay attention to colour-coding in modules 2 and 7).
  - Binding options: guides can be spiral-bound; hole-punched and inserted into a ring-folder; or each module can be stapled together at the top left corner and kept together in a manila folder or something similar.
- Methods cards and reporting cards:
  - One copy per team/organisation (available at [http://betterevaluation.org/resources/guide/IDEAS\\_Guide](http://betterevaluation.org/resources/guide/IDEAS_Guide)).
  - Printing instructions: A4, single-sided, colour printing (black and white printing may also be manageable if this is the only option).
  - Fold each sheet in half along the dotted line to form cards.
- Printed copies of the workshop schedule in appendix 2/downloadable files from [http://betterevaluation.org/resources/guide/IDEAS\\_Guide](http://betterevaluation.org/resources/guide/IDEAS_Guide) (one for each participant).
- Printed copies of the workshop evaluation questionnaire in appendix 5/downloadable files at [http://betterevaluation.org/resources/guide/IDEAS\\_Guide](http://betterevaluation.org/resources/guide/IDEAS_Guide) (one for each participant).
- Printed calendar template for each team/organisation. These can be downloaded and adapted from <http://www.calendarlabs.com/printable-calendar.php>.
- Copies of any applicable funding guidelines.
- Copies of any applicable ethical guidelines.

## Materials and equipment

- Laptop or computer, and projector, extension cords and power boards.
- Adapted version of the workshop PowerPoint (see appendix 1 for information on accessing the slides).
- Notebooks and pens for participants.
- Butchers/flip chart paper.
- Sticky notes (or, where not available, small pieces of paper).
- Textas/marker pens.
- Scissors.



- 15-20 small items such as buttons or stones per group (for day 1, module 2).
- Internet access (to watch the Rugby Plus video mentioned in module 10; see appendix 1 for information on other access options), or other relevant examples of good and/or alternative ways to report or share project results.

### **Main preparation tasks**

- Book workshop space.
- Book catering.
- Recruit facilitators.
- Meet with facilitators.
- Adapt files, including schedule and slides.
- Arrange per diems for participants (as appropriate).

### **Participants to prepare**

- Any paperwork stating project goals, including original project proposals or theories of change if available.
- Copies of existing project plans and activity calendars.
- Copies of any other existing monitoring and evaluation plans or reporting requirements.

## Introduction to the *IDEAS Guide*

**Purpose:** The purpose of the introduction is to provide participants with an overview of the workshop, to introduce the *IDEAS Guide*, and to establish an open and trusting group dynamic.

**Recommended time for this stage:** 45 minutes

**Materials needed for the activities:** Notebooks, pens, pencils, butchers/flip chart paper and textas/marker pens (optional), and printed copies of the workshop schedule.

**Session breakdown:**

Presentation: Introduction of facilitators (5 mins)

Facilitation: Introductions by participants (10 mins)

Activity: Icebreaker (15 mins)

Facilitation or activity: Workshop guidelines (5 mins)

Presentation: Workshop schedule (5 mins)

*Optional activity: Expected outcomes (+5 mins)*

Presentation: Overview of the *IDEAS Guide* (5 mins)

**Slides:**

Slide 1: Welcome to the *IDEAS Guide* workshop

Slide 2: Workshop guidelines

Slide 3: Workshop schedule

Slide 4: Workshop schedule (continued)

Slide 5: Overview of the *IDEAS Guide*

Slide 6: Overview of the *IDEAS Guide* (continued)

### Presentation: Introduction of facilitators

- Welcome participants and introduce yourselves.
- Explain housekeeping items, such as break times, restroom locations, etc.
- Refer participants to the *IDEAS Guide*.

**Notes:** *First impressions matter. Arrive early and present an impression of someone who is well-prepared, confident and excited about the workshop. Chat with people who arrive early to help them feel at ease.*



*It is not uncommon for people to arrive a little late; however, it's important to balance this with respect for those who have arrived on time. A good way to manage this is to decide in advance when you will actually start on day 1 (maybe 15 minutes after the official start time), and raise 'starting and finishing on time' as a workshop norm that everyone agrees to so that you can start closer to the official start time on days 2 and 3.*

*It may be appropriate, depending on cultural context, to say a blessing or a prayer at the beginning of the day or before meals. One of the participants may also wish to lead the prayer or blessing, which often works well in participatory workshops.*

### Facilitation: Introductions by participants

- Ask participants to introduce themselves and their projects, and to share any previous experiences of evaluation.

**Notes:** *Participants often come with some experience of evaluation. By introducing their experiences and projects upfront, the workshop should begin a process of building on current evaluation knowledge and providing a language for what they already do, while also learning new ideas and methods.*

### Activity: Icebreaker

- Sample icebreakers are listed in appendix 3.

**Notes:** *Icebreakers are quick and fun activities intended to help workshop participants become more comfortable and relaxed. They are particularly useful if participants don't know each other well.*

### Facilitation or activity: Workshop guidelines

It is important to establish some workshop guidelines, or 'norms', that the group will agree to follow. There are two options:

1. Activity: Ask participants to list items for the group guidelines and write on a piece of flip chart paper. You might suggest one item to start with. Pin up the list to serve as a reminder.
2. Facilitation: Use the workshop guidelines (slide 2) to discuss some basic guidelines, and ask for any additions as well as confirmation from the group that they will adhere to them for the duration of the session.
  - When discussing punctuality, emphasise that the facilitators will do their best to finish on time, but that it is equally important that everyone arrives on time.
  - Ensure that you cover how the group wants to handle the use of mobile phones (remember that some people, particularly parents or carers, may need to leave their phones on and be able to answer calls).

### Presentation: Workshop schedule

Review the agenda (slides 3 and 4). We also recommend printing appendix 2 as a handout for participants to refer to).

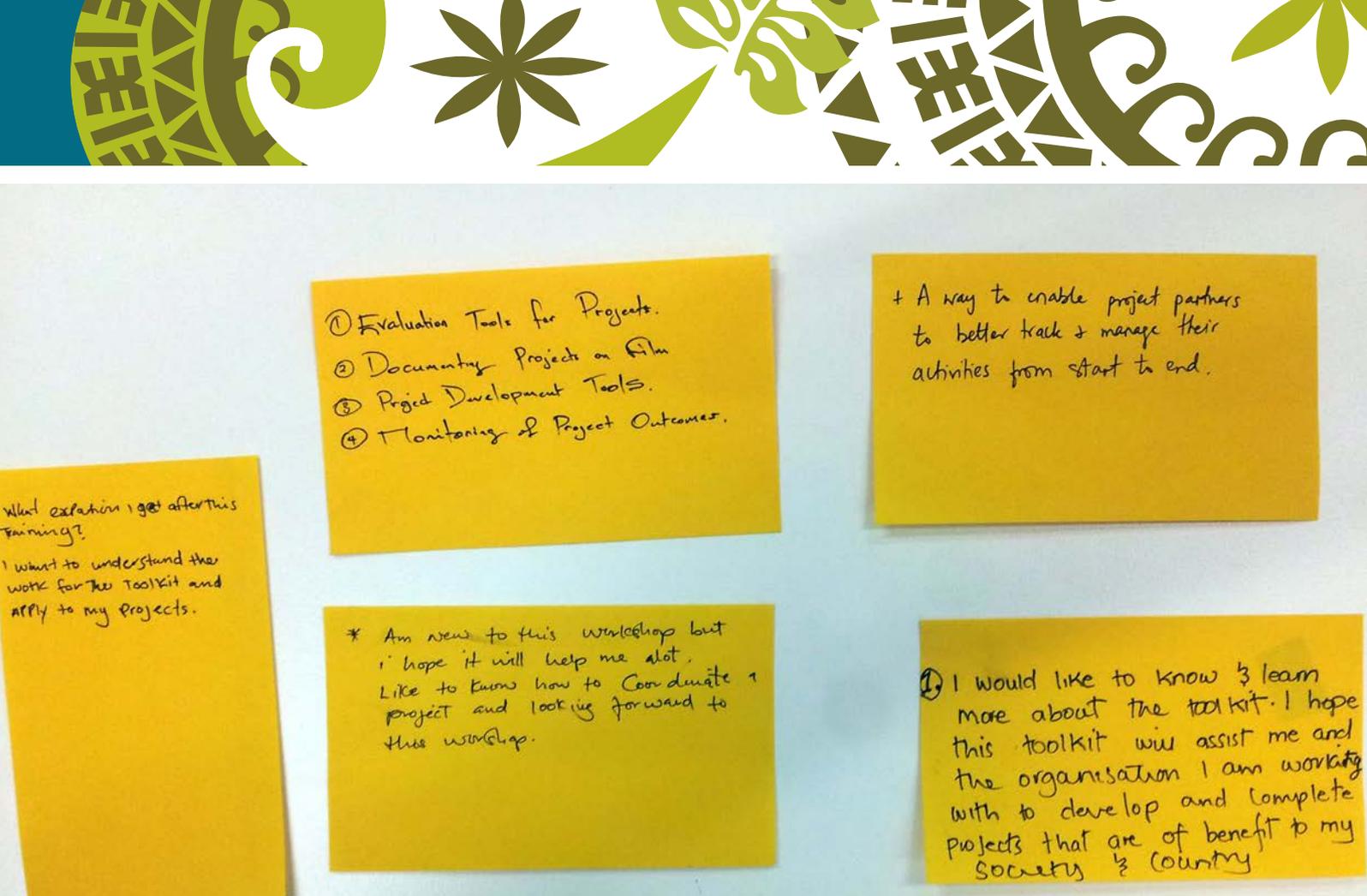


Figure 1. Expectations activity (optional).

### Activity: Expected outcomes (optional)

- Ask participants to write down their expectations on sticky notes (one expectation per note).
- Sort the expectations into groups.
- Discuss which ones are within the scope of the workshop, and which ones need to be ‘parked’ for coming back to later.
- See figure 1 (above) for an example of this activity.

**Notes:** This activity is optional. The alternative to doing this activity is to skip directly to the overview of the IDEAS Guide, and to use that to talk about outcomes, and open up discussion about participants’ expectations. However, this activity offers a more participatory way to have this conversation.

### Presentation: Overview of the IDEAS Guide

- Go through the summary of the IDEAS Guide on slides 5 and 6, and in the introduction section of the IDEAS Guide.
- If the expected outcomes activity was skipped, ensure that you point out the objectives.
- Explain the two parts to the IDEAS Guide (part 1 and part 2), and how each of the modules builds on each other.

# PART 1





# Module 1: Understanding the role of evaluation and learning in innovation

**Purpose:** Module 1 frames evaluation as continual learning. The purpose is to introduce the concept of learning-based evaluation, emphasising how evaluation can help project teams and other stakeholders to learn about what's working, and how they can improve the project.

**Recommended time for this module:** 1 hour, 5 minutes

**Materials needed for the activities:** Notebooks, pens, pencils, butchers paper, and textas/markers or string (see options).

## **Module breakdown:**

Presentation: Introduction to module 1 (10 mins)

Activity 1: Understanding which type of course you are travelling (20 mins)

Activity 2: Considering the type of evaluation that matches your learning pathways (20 mins)

Presentation and facilitation: Differences between common thinking about evaluation and the *IDEAS Guide* evaluation approach (10 mins)

Facilitation: Wrap up (5 mins)

## **Slides:**

Slide 7: Part 1 (title slide)

Slide 8: Module 1 (title slide)

Slide 9: Activity 1: Understanding which type of course you are travelling

Slide 10: Activity 2: Considering the type of evaluation that matches your learning pathways

Slide 11: Differences between common thinking about evaluation and the *IDEAS Guide* evaluation approach

## **Presentation: Introduction to module 1**

- Explain that this module will help teams/participants to understand what kind of learning journey they are on, and what type of evaluation matches that pathway.
- Introduce the idea of learning in innovative projects as being a bit like sailing to an island.
  - When sailing you have a destination in mind, but there are several different ways to get there.
  - You need to be able to observe changes in your environment (for instance, in the winds, currents and tides), and be able to adapt your course.
  - You will probably encounter and need to deal with unexpected obstacles and dangers like reefs.
  - Unlike driving a car, you can't sail in a straight line. Sailing is about making small decisions



about how best to get to your destination.

- o You need strong teamwork and communication with your crew.
- Explain that the *IDEAS Guide* helps project teams to plan the navigation equipment needed to observe and learn throughout the project journey, and to make changes to the course where necessary while keeping the ultimate goal in mind.

### Activity 1: Understanding which type of course you are travelling

1. Introduce the four kinds of 'learning journeys' (slide 9).
2. Leave the slide up throughout the activity.
3. With reference to the diagram on slide 9, make a line across the room with string.
4. Explain that: one end of the room means 'travelling a well-known route'; the other end of the room is 'travelling a new route'; and, in the middle is 'travelling an unexplored route'.
5. Designate another corner of the room as the 'finding a destination' (finding a project goal) spot.
6. Ask workshop participants to move to where they think they fit along the spectrum.
7. Ask each person to explain why they are standing in that position.
8. Discuss how these different learning journeys can indicate what kind of evaluation may be appropriate.
9. Return to the sailing metaphor and the idea that evaluation is essentially a learning journey, and is especially important in innovative projects.

**Notes:** *The pathways activity is a spectrum of practice and does not provide rigid categories. Most projects will fall somewhere in the middle; few will be at the extreme ends.*

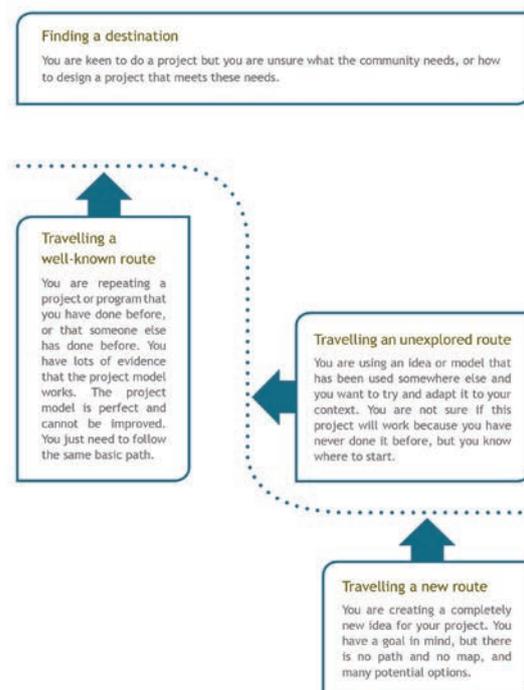


Figure 2. Finding your learning journey exercise.  
(Figure 2, page 10 in the *IDEAS Guide*.)

## Activity 2: Considering the type of evaluation that matches your learning pathways

- Go through the information on slide 10 as an introduction to what the different learning journeys tell us about evaluation needs.
- Break into small groups for discussion.
- Refer back to the opening activity to think about these categories as being on a spectrum. Projects may be between two categories.
- Share key points for small-group discussion with the larger group.

**Notes:** Try to avoid jargon and to explain any new concepts with examples. It might be useful to point to the glossary at the end of the IDEAS Guide.

Always be aware of group dynamics. While it is convenient to have people from one organisation working in the same group, be aware of factors such as gender, age, position, seniority, disability and other differences, and how these might influence how comfortable participants are with talking or sharing ideas in the group. Begin by observing. Use your judgement to decide when and how it might be helpful for you to intervene. Possible ways of intervening as a facilitator include: changing the way groups are organised (for example, mixing up groups or splitting groups into smaller groups); sitting with groups to actively facilitate and ask questions directly to quieter participants; directly reminding participants to make that sure everyone has a chance to speak; and giving directions such as, 'Go around the group to hear everybody's answers'.

Finding the route to travel!	Travelling the well-known route	Travelling an unexplored route	Travelling a new route
Wait	Track and monitor	Test and learn	Intensive testing and innovation
<p>Before moving ahead, you will need to consult with the community and ask, "What is needed?".</p> <p>When you have a project, you can return here to find the right path to take, and then continue on through the guide.</p>	<p>Since you know the path works, your main task is to continually check that everyone stays on track and that processes are being followed correctly.</p> <p>The main focus of your evaluation plan will be monitoring and tracking to make sure things are still going well (see module 8).</p> <p>Unexpected events can still happen on this path, and there may be a need for innovation and a change of plans in response to your data.</p>	<p>You will need to test your idea in the field, and look at processes and impacts to assess what's working, and what's not working as expected.</p>	<p>Because your project is in an experimental or pilot phase, you need to carefully document processes, and give your organisation time to reflect on achievements and challenges. This resembles sailing in that you may need to change tack or direction.</p>
Useful learning questions for your path			
How is it going? You will need to set targets and track progress against your goals.	What results have been produced and for who? What has (or has not) worked?	How is it going? What has (or has not) worked? How could you improve?	

Figure 3. Evaluation styles and questions for different learning journeys.

(Table 2, page 11 in the IDEAS Guide.)



## Presentation and facilitation: Differences between common thinking about evaluation and the *IDEAS Guide* evaluation approach

- Use slide 11 to explain how we think about and use the term 'evaluation' in the *IDEAS Guide*.
- Open up a discussion about how this is similar to or different from participants' previous experiences and thinking about evaluation.

Common thinking about evaluation	<i>IDEAS Guide</i> evaluation approach
Evaluation is something that is done at the end of a project.	Evaluation is designed at the beginning and is a process of continual learning throughout the project.
The evaluation is primarily for funders.	The evaluation is for a range of interested stakeholders, including the project team and funders.
The purpose of evaluation is to prove to the funders that the project was a valuable investment.	The purpose of evaluation is to listen to stakeholders, adapt and improve the project, and share what you have learned with all interested stakeholders, including funders and communities.
Funders decide the design and plan for the evaluation.	The project team should lead the design and plan for their evaluation (with interested stakeholders) so that it is relevant to their needs.
To be an evaluator you must have expert skills.	Most organisations are already doing evaluative activities, such as asking for feedback. These processes can be strengthened.
Evaluation is done by people from outside the organisation.	When a project team plans and manages their own evaluation, the evaluation findings are more relevant and useful, and can be used to improve the project or future projects.
Evaluation is expensive and time consuming.	Evaluation plans should be realistic. There are options that suit small-scale projects.

Figure 4. Different approaches to evaluation.  
(Table 3, page 12 in the *IDEAS Guide*.)

### Facilitation: Wrap up

- Invite participants to share their reflections on the activity.
- Summarise what has been covered in the module:
  - The potential for evaluation to be a continual learning process.
  - Identifying ways in which their organisation is already doing evaluation.
  - Identifying the level of learning and innovation they will need to reach their project goals, and what this means for how they begin their journey.
- Open up to questions about the module. Prompt participants to:
  - Raise questions about any new concepts; and
  - Reflect or comment on the ideas discussed.



Ask participants to keep their notes about learning questions, as key questions will be developed further in module 7.

## Module 2: Defining your project goals and priorities

**Purpose:** The purpose of module 2 is to articulate the aims of the project, and to clarify the underlying approaches. Having a clearly defined project is a foundational part of planning learning and evaluation.

**Recommended time for this module:** 1 hour, 25 minutes

**Materials needed for the activities:** Scissors, 15-20 small items of similar size per group (items could be buttons, stones, seeds, etc.) for the sorting and comparing exercise, notebooks and pens.

### **Module breakdown:**

Presentation: Introduction to module 2 (10 minutes)

Activity 1: What are you trying to do? (20 mins)

Activity 2: How are you trying to do it? (45 mins)

Facilitation: Wrap up (10 mins)

### **Slides:**

Slide 12: Module 2 (title slide)

Slide 13: Activity 1: What are you trying to do?

Slide 14: Four basic approaches most media and communication projects use

Slide 15: Activity 2: How are you trying to do it? Step 1: Sorting and comparing project approaches using objects

Slide 16: Activity 2: Step 2: Ranking different project approaches

Slide 17: Activity 2: Step 3: Goal statements (an example)

### **Presentation: Introduction to module 2**

- Explain that this module includes tools to help teams/participants express their project goals and aims, and to prioritise and think about them in different ways.
- Explain that the first step is to think about and discuss the change that they want to see from their project (using slide 13).

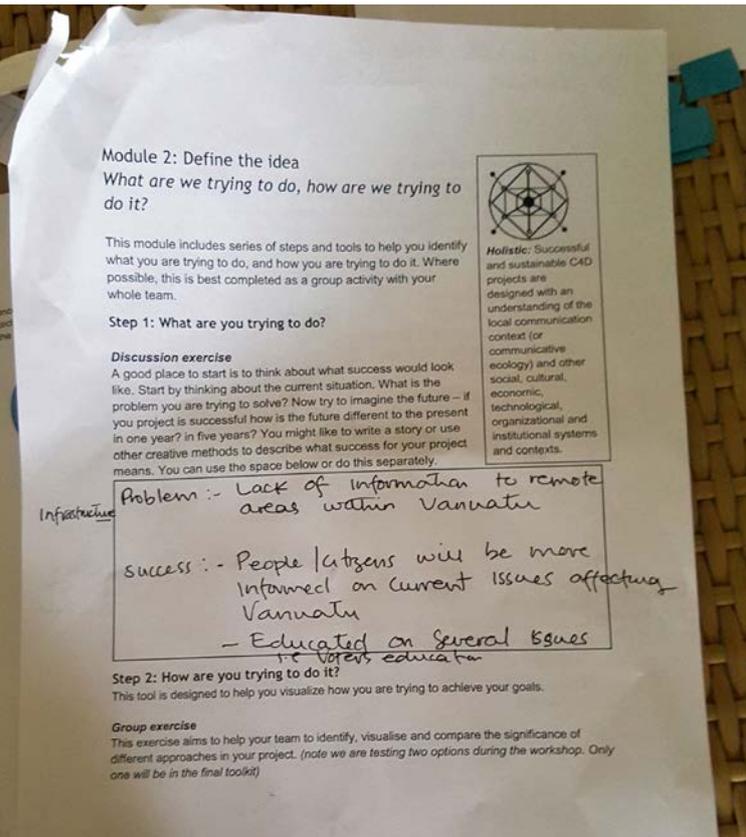


Figure 5. Identifying project goals.

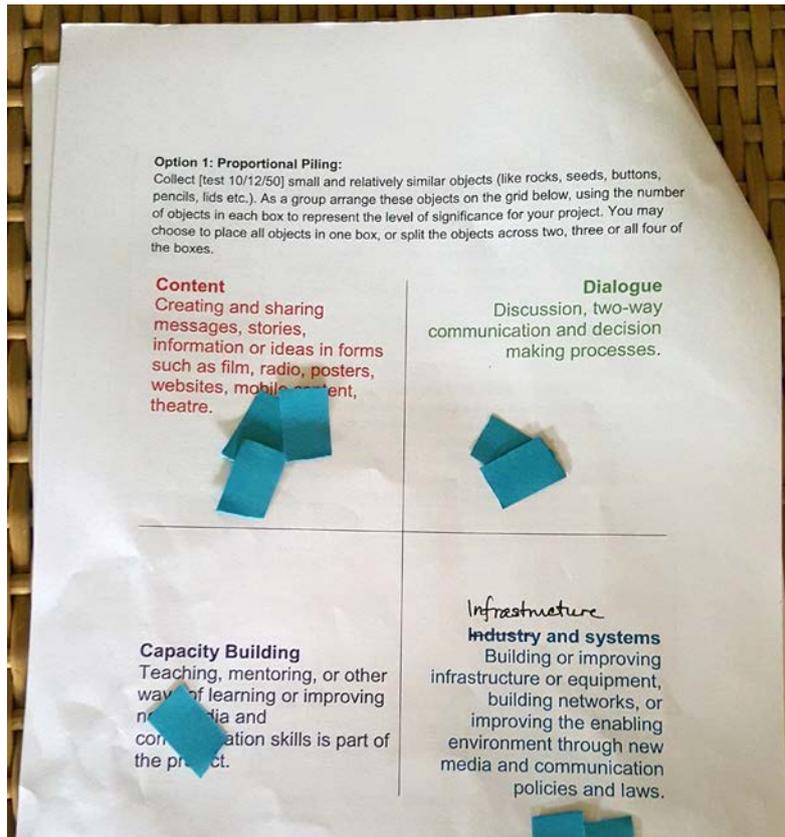


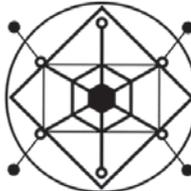
Figure 6. Sorting and comparing exercise.

### Activity 1: What are you trying to do?

- In small groups (usually project/organisation teams), participants discuss the change that they are trying to create in their projects.
- Encourage teams to look at any project plans, but also to think more broadly and widely than this, and to imagine other changes.
- Ask at least one person in the group to write down or record a goal statement.

**Notes:** Although the grant recipients wrote project descriptions in their applications, these ideas often evolve and develop throughout the project funding, design and evaluation processes. As a facilitator, you can play a key role in shaping the process of change.

It is important that participants are given the freedom to explore and express possible changes. Participants may discuss things that you disagree with and you can ask questions about the direction they're heading in, but it is important not to tell the participants what they should or shouldn't do. These conversations will be important in later modules.



**Holistic:**

Successful and sustainable communication and media projects are designed with an understanding of the local communication context (or communicative ecology) and other social, cultural, economic, technological, organisational and institutional systems and contexts.

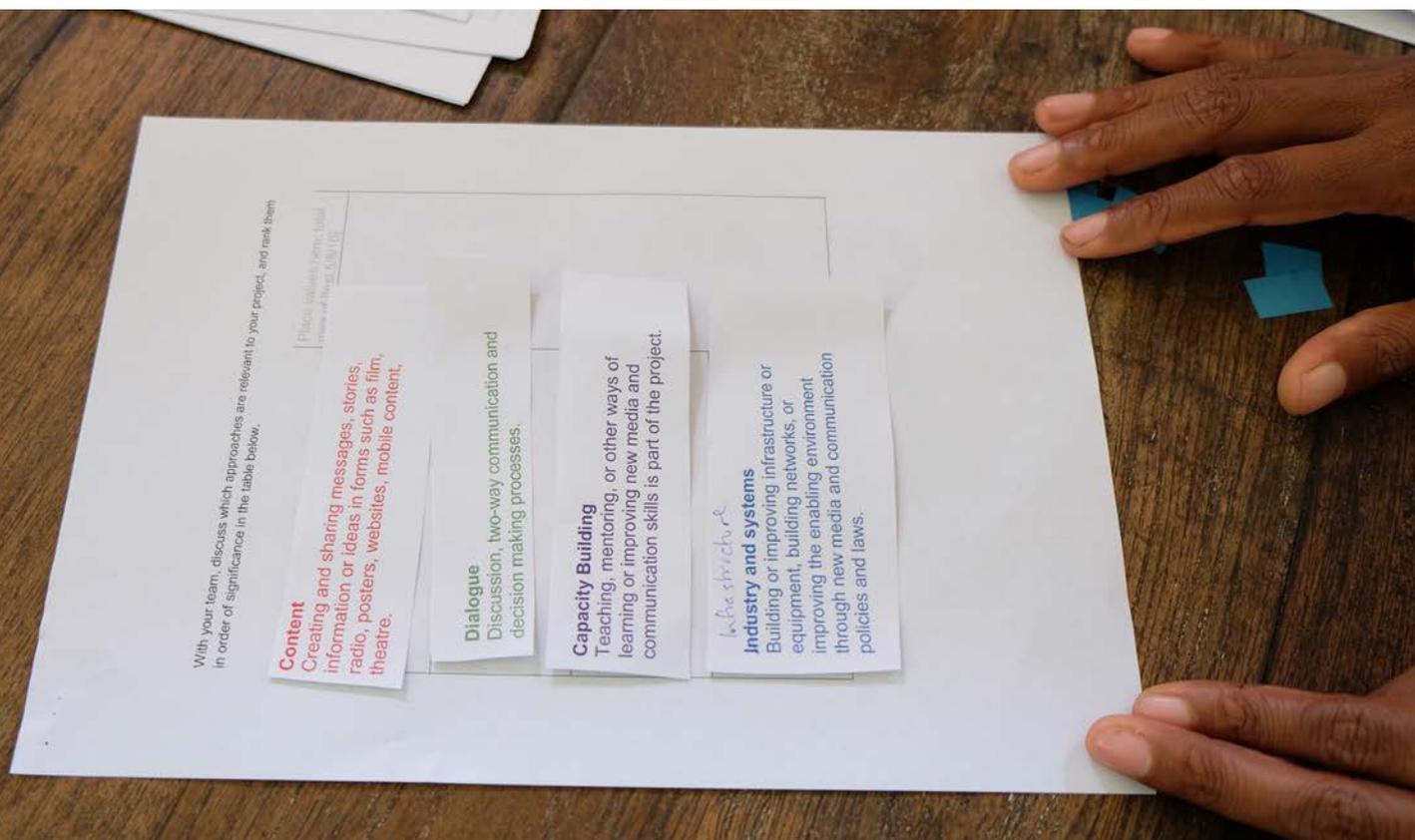


Figure 7. Ranking project approaches and writing goal statements activity.

## Activity 2: How are you trying to do it?

- Introduce the four project components (slide 14).
- Present the sorting tool, which is designed to unpack the goals and project components (slide 15).
- Illustrate and discuss how media and communication projects might include 1, 2, 3 or all 4 of the project components. You can give your own examples.
- Use slides 15-17 to provide an overview of the steps (sorting and comparing project approaches, ranking and writing goal statements).
- Give each group their 15-20 small objects (rocks, seeds, buttons, pencils or lids) for step 1, and direct groups to place the *IDEAS Guide* on a flat surface open to page 16 where they will find the boxes of project components.
- In small groups, participants should follow the steps outlined in the *IDEAS Guide*.

**Notes:** *The tool in step 1 (based on proportional piling) is designed to help the teams to identify, visualise and compare the significance of different approaches in their project. It is used as a way to generate discussions and negotiations, as people have different perspectives on what is the most important aspect of the project. Such discussion ultimately helps participants to articulate visions and perspectives to each other, and to reach some consensus.*

*Step 2 allows participants to see their ranked priorities in a different way and to record the visions they articulated in activity 1.*



**Notes:** Writing down goals for each project component will be helpful for the later development of evaluation questions.

An important thing to mention during the ranking and goal statements exercise is that the goals are interconnected and may shift at different stages of a project. One example of this came from a previous IDEAS workshop where one of the teams was planning a suitcase radio project. At the beginning of the project, infrastructure was more important. Once the infrastructure was set up and the suitcase radio was up and running, content would become more important as a way of creating more dialogue in the community and leading to change on a policy level. In this way, we can see that the goals support one another.

### Facilitation: Wrap up

- Ask each group to report back on the activity, and encourage other teams to give feedback and comments.
- Summarise what has been covered in the module:
  - Identifying project goals and how the project works towards change.
  - Identifying which aspects of the project are most important, and therefore which should be the focus of evaluation.
- Open up to questions about the module. Prompt participants to:
  - Raise questions about any new concepts; and
  - Reflect or comment on the ideas discussed.



Make sure that participants keep their goal statements. They will be useful for refining the evaluation questions in module 7.

## Module 3: Understanding the people connected to the project (stakeholders)

**Purpose:** The purpose of module 3 is to identify the project stakeholders. Participants will create a map of all the people and groups connected to the project, and their interests. The stakeholder map is built-on in later sections.

**Recommended time for this module:** 50 minutes

**Materials needed for the activities:** Sticky notes, flip chart paper, textas/markers, notebooks and pens.

**Module breakdown:**

Presentation: Introduction to module 3 (10 mins)

Activity: Stakeholder mapping (30 mins)

Facilitation: Wrap up (10 mins)

**Slides:**

Slide 18: Module 3 (title slide)

Slide 19: Activity: Stakeholder mapping

Slide 20: Activity: Step 4: How are you engaging with your stakeholders in terms of design and evaluation?

### Presentation: Introduction to module 3

- Explain that stakeholder mapping can be a useful process to undertake at the beginning of a project.
- Thinking through who the stakeholders are will help to develop the project and evaluation designs in ways that are more participatory and sustainable.
- The stakeholder map developed in this module will be used throughout the modules to reflect upon how different stakeholders will be involved in the project evaluation.



## Activity: Stakeholder mapping

- In small groups (ideally project/organisation teams for this activity), participants should follow the steps outlined in the *IDEAS Guide* and on slide 19.
- In step 2, prompt participants to think about any alternative ways to group or categorise the stakeholders.
- The reflections on the nature of connections in step 3 are a starting point for further reflection in the next module.
- Step 4 may include some new concepts (slide 20). Further, thinking about groups who are not committed, or who may disrupt projects, might provoke thinking about new groups as 'stakeholders'. These can be added to the map.

**Notes:** *If you don't have sticky notes, this activity can be done on flip chart paper or on a white/blackboard. However, the sticky notes make it easier to revise and move things around.*

*Not all stakeholders will require the same amount of attention. It might be helpful to remind the groups to focus upon the key stakeholders first.*

### Facilitation: Wrap up

- Invite groups to share their reflections on the stakeholder mapping process.
- Review and summarise what has been covered in the module:
  - Identifying and mapping all the different stakeholders connected to the project.
  - Reflecting upon the different interests and contributions of each of the stakeholders to the project (including conflicts).
- Open up to questions about the module. Prompt participants to:
  - Raise questions about any new concepts; and
  - Reflect or comment on the ideas discussed.



Ask participants to keep their stakeholder maps as they will be used in modules 4, 5 and 6.

## Module 4: Stakeholder participation and communication

**Purpose:** The purpose of module 4 is to consider how to best communicate and engage with different stakeholders, and how to incorporate different kinds of expertise. The aim is to encourage more participatory modes of engagement with a range of stakeholders.

**Recommended time for this module:** 1 hour

**Materials needed for the activity:** Stakeholder map from module 3, textas/markers, pens and extra sticky notes.

**Module breakdown:**

Presentation: Introduction to module 4 (10 mins)

Facilitation: Engaging different kinds of expertise, and culture and customs (10 mins)

Activity: Thinking about your engagement and communication styles (30 mins)

Facilitation: Wrap up (10 mins)

**Slides:**

Slide 21: Module 4 (title slide)

Slide 22: Engaging different kinds of expertise

Slide 23: Ideas for bringing in more local expertise

Slide 24: Culture and customs

Slide 25: Activity: Thinking about your engagement and communication styles

### Presentation: Introduction to module 4

- Refer back to the sailing metaphor and highlight that this module will focus upon communicating and working with those who are coming along on the journey.
- Explain that this module will build on the stakeholder map prepared in module 3 to identify how to best communicate with stakeholders.
- Present the concept of 'participation' in projects as being about creating opportunities for speaking and listening with all stakeholder groups. Explain how this can contribute to project success and shared learning.
- This module also explores how to utilise stakeholders' different kinds of expertise, and how to take into account culture and customs.



## Facilitation: Engaging different kinds of expertise, and culture and customs

- Use slide 22 to discuss different kinds of project expertise.
- Invite participants to share ways in which they have incorporated different kinds of expertise in the past, or times when they have faced problems because they didn't have the expertise they needed. More examples can be found in the *IDEAS Guide* and on slide 23.
- Use slide 24, and your own examples, to discuss culture and customs.
- Open up a discussion of examples from participants' practices and contexts.

**Notes:** *This module seeks to encourage practitioners and organisations to consider how they can make their projects more participatory, inclusive and locally relevant by valuing and considering different kinds of expertise and contributions to the project design. In the IDEAS Guide, there is an example from practice that helps illustrate this point. There are also boxes that suggest options to consider in order to make projects more participatory and locally relevant.*

*When discussing culture and customs, it is best to adapt your workshop as much as possible to the local context. Try to use local examples that you know of to show good, and not-so-good, practices, and things to be taken into account in the local environment.*



**Participatory:**

Local participants and experts often have experience and knowledge about your project that will be useful for learning and evaluating. How can you involve all kinds of stakeholders in the design and evaluation processes?

## Activity: Thinking about engagement and communication styles

- In small groups (ideally project/organisation teams), participants should follow the steps outlined in the *IDEAS Guide*, building on the stakeholder map from module 3.
- In step 1, prompt participants to think about relationships in a range of ways, including the formality or informality of interactions, frequency of interactions, mode of interactions (face-to-face or by some form of communication technology), physical distance, remoteness, power imbalances, dependence, and personal relationships or friendships.
- Use the dot points listed in step 2 as a starting point for prompting thinking about what the nature of the relationship means for the project, and whether some connections need to be strengthened.
- Step 3 links back to the earlier discussions about including different kinds of expertise. Refer to the example on pages 26-27 of the *IDEAS Guide*, or use slide 23 for examples of including more local expertise for different kinds of projects.



**Notes:** It is usually, though not always, the case, that external and technical expertise dominate decision-making and planning, and this is why there are extra resources in the IDEAS Guide to help encourage the inclusion of local expertise. Similarly, if there is an overrepresentation of local expertise and very little technical expertise, this can also cause problems, and facilitators could offer suggestions for incorporating more technical advice.

*This is a useful point at which to consider issues of inclusion. You can prompt teams to think about their projects from a gender and disability inclusion perspective, to ensure that the project design and evaluation reflects on these factors.*

### Facilitation: Wrap up

- Invite participants to share their reflections on the activity.
- Review and summarise what has been covered in the module:
  - Considering opportunities for stakeholders to participate.
  - Identifying ways to effectively communicate.
  - Exploring how different kinds of expertise might contribute to the project.
- Open up to questions about the module. Prompt participants to:
  - Raise questions about any new concepts; and
  - Reflect or comment on the ideas discussed.



Ask participants to keep records of their decisions from this module; these will be useful for discussions about evaluation questions in module 7.

## Module 5: Doing the right thing by the people involved with the project (ethics)

**Purpose:** Module 5 explores potential ethical issues and risks in communication projects. The purpose is to prompt reflection on these issues, locate ethics in the cultural context, and start developing strategies for preventing risks.

**Recommended time for this module:** 1 hour, 25 minutes

**Materials needed for the activities:** Pens and notebooks.

### Module breakdown:

Presentation: Introduction to module 5 (15 mins)

Activity 1: Risks in media and communication projects (30 mins)

Activity 2: Considering your own project's ethical risks (30 mins)

Facilitation: Wrap up (10 mins)

### Slides:

Slide 26: Module 5 (title slide)

Slide 27: Considering the risks

Slide 28: Activity 1: Examples of ethical risks

Slide 29: Activity 2: Considering your own project's ethical risks

### Presentation: Introduction to module 5

- Introduce this module as being about ethical issues in media and communication projects. Ethics is about making sure you are doing to the right thing by the people involved.
- Using slide 27, discuss the following key areas of ethical risk in media and communication projects:
  - Being ethical means doing everything you can to **make sure people won't be negatively affected** by participating in your project. It also means that if risks are unavoidable, you clearly explain what they are.
  - An important part of being ethical is **explaining what the project aims to do**, what you want people to do, being clear about any risks, and then **getting people's permission**. **This is called 'informed consent'**.
  - You can inform people verbally by talking to them, or by giving them a written description. You can also get their consent verbally, or by asking them to sign a written form. This depends on what is appropriate for the participants.
  - In the field of media and communication, some particular issues to consider include the use of a person's name and image – this is called **'representation'**.



- Another important risk to consider when collecting personal information is how you will **protect people's private information**.
- **Working with children and youth increases the risks**, and it is good practice to ask that a parent or carer is present when young people are participating.
- Think about whether your project could cause any harm for participants or others, or if it could lead to people feeling hurt or offended.
- Signal that the next activity may help to identify and understand some of these issues in practice by using examples based on real-life cases.
- Open up for comments or questions.

**Notes:** Before beginning the workshop, learn a bit about the different projects so that you can identify and speak about issues that are important to the participants. Broadcast, for example, will have different ethical considerations compared to a capacity-building project.

If the donors, managing organisations or the participants' organisations have other ethical codes of conduct or policies, you should also discuss them during this module.

### Activity 1: Risks in media and communication projects

In small groups (not necessarily in project/organisation teams), participants should follow the steps outlined in the *IDEAS Guide*.

### Activity 2: Considering your own project's ethical risks

- In small groups (ideally in project teams), participants should follow the steps outlined in the *IDEAS Guide* to fill in the risk assessment table.
- Encourage groups to refer to the stakeholder map to consider the possible ethical risks that different stakeholders might face.



Figure 8. Examples of ethical issues in media and communication projects. (Figure 9, page 33 in the *IDEAS Guide*.)



### Facilitation: Wrap up

- Invite participants to report back on the risks identified and to share their reflections on the activities.
- Review and summarise what has been covered in the module:
  - Understanding some of the common ethical risks in media and communication projects.
  - Considering ethical risks associated with current projects.
  - Exploring strategies for preventing or reducing the risks.
- Open up to questions about the module. Prompt participants to:
  - Raise questions about any new concepts; and
  - Reflect or comment on the ideas discussed.



Ask participants to keep their notes and their risk assessment. They will be discussing ethical risks again in module 8.

## PART 2

### Welcome back

**Purpose:** The purpose of this session is to reflect on the themes covered in day 1, reinforce the key insights, and set up a positive transition to day 2.

**Recommended time for this stage:** 15 minutes

**Materials needed:** *IDEAS Guide*, pens and notebooks.

**Session breakdown:**

Facilitation: Recap of day 1 (5 minutes)

Presentation: Introduction to day 2 (10 minutes)

**Slides:**

Slide 30: Day 2: Welcome back

Slide 31: Recap of day 1

Slide 32: Introduction to part 2: Developing an evaluation plan

### Facilitation: Recap of day 1

- Thank everyone for coming along on time for day 2.
- Open up a discussion about one key thing participants remember from day 1. (Optional: These points could be noted on a whiteboard or flip chart paper.)
- If the following points do not come up in the discussion, briefly recap these key ideas using slide 31:
  - 'Evaluation' is not just for the funders. It can also be useful for organisations and others involved with the project.



- Good evaluation supports learning. This means that it tells you what is working and how things could be done better.
- To be able to use evaluation for learning, you need to think about and plan evaluation at the beginning of the project, and build it into the design.

### **Presentation: Introduction to day 2**

- Explain that part 1 of the *IDEAS Guide* focused on developing a clear picture of the design of participants' small grants projects. Part 2 is all about the evaluation. The work completed in modules 1-5 will be used to create an evaluation plan.
- Introduce some key concepts (as outlined on slide 32):
  - Organisations are probably already doing 'evaluation' work, but they may not be thinking of it as evaluation, or perhaps not be doing it systematically.
  - Present the concept of 'data', which is referred to throughout part 2 and is important in evaluation. 'Data' is feedback and information that is collected and organised in a systematic way.
  - Talk about 'data analysis' as a systematic process for making sense of data.
  - Being systematic in this way helps to generate 'evidence' to use and share with others.

**Notes:** *You can decide for yourself if icebreakers are needed at the beginning of the second day, based on participants' energy levels. Useful icebreakers are included in appendix 3 for when they are needed.*

## Module 6: Planning data-use

**Purpose:** Module 6 focuses on data-use, and works towards creating a data-use calendar. The purpose is to identify points in the project timeline at which data could be used to inform improvements in order to support a learning-based approach.

**Recommended time for this module:** 1 hour, 15 minutes

**Materials needed for the activities:** Teams' own project activity calendars (printed by participants) or printed data-use calendars as a back up (blank calendars are available online, see <http://www.calendarlabs.com/printable-calendar.php>), pens and notebooks.

### **Module breakdown:**

Presentation: Introduction to module 6 (10 mins)

Activity 1: Uses and users of evaluation data (10 mins)

Presentation: Introduction to the data-use calendar (10 mins)

Activity 2: Data-use calendar (30 mins)

Presentation: Introduction to the learning loop (5 mins)

Facilitation: Wrap up (10 mins)

### **Slides:**

Slide 33: Module 6 (title slide)

Slide 34: Activity 1: Uses and users of evaluation data

Slide 35: Activity 2: Data-use calendar

Slide 36: The learning loop: A tool for continual learning

### **Presentation: Introduction to module 6**

- If not covered in the introduction to day 2, introduce 'data' as feedback and information that is collected and organised in a systematic way.
- This module will focus on who will use the data, and when they will want to use it, as a basis for planning data collection.
- Module 7 looks at what data is needed (what the key questions are), and module 8 talks about how data will be collected. All these decisions are connected, but it's best to start with who and when to make sure the data can be used for learning.



### Activity 1: Uses and users of evaluation data

- This is a relatively quick discussion activity to orient the focus on data and evaluation around the key users.
- Direct participants to refer to the stakeholder map from module 3.
- In small groups (ideally in project/organisation teams), participants should discuss the points listed in the *IDEAS Guide* and on slide 34.

**Notes:** *This is a key moment to broaden thinking about the uses of evaluation; from the idea that it is simply something to be done for the funder at the end of the project, to the notion that it is something that is useful for the organisation and project team for learning, as well as being for community members and other stakeholders.*

### Presentation: Introduction to the data-use calendar

- Introduce the data-use calendar as a tool that can be used to help plan when to collect data based on when it will need to be used.
- The calendar should note major project milestones, such as:
  - o scheduled project activities;
  - o planning periods; and
  - o due dates for reports.
- The calendar should also identify the optimal times to collect, analyse and use the data to inform improvements. Use of the data in reporting to stakeholders can then be filled in.
- Explain how collecting data during a project can help to improve projects during the project cycle, improve the accuracy of data, and make reporting cycles easier.

**Notes:** *Participants will keep these data-use calendars to develop their evaluation plan in module 8. As this module works best when participants can apply it directly to their work, ask them to bring their project calendars and planners to draw from.*



#### Learning-based:

Evaluations should focus on being useful, and on supporting learning. Learning depends on good communication, cooperation, collaboration and trust between all involved.

## Activity 2: Data-use calendar

- Project teams should follow the steps in the *IDEAS Guide* to add key project activities and deadlines to the calendar, and identify opportunities for data collection.
- Ask probing questions to help teams think about whether they have enough time to analyse the data and to prepare reporting media, and importantly, enough time to reflect on and use what they have learned to adjust the project design in the next stages.
- Remind participants that when they have completed their data-use calendar, they can share it with their stakeholders and discuss their plans with them.

## Presentation: Introduction to the learning loop

- Using slide 36, introduce the 'learning loop' as a tool that can help guide discussions in meetings. (Note: This is not intended as a workshop activity, but rather, a tool teams can take away for future use.)
- Explain the way the learning loop would be used in meetings:
  1. Firstly, recent activities would be discussed.
  2. This would lead onto a discussion about significant insights and stories.
  3. After reflecting on these insights, a discussion about recommendations and any identified gaps in knowledge should follow.
  4. Finally, any new actions to improve the project, or to get the project back on track, can be decided upon. Remember that sometimes the best 'action' is to pause and wait for a better time, or to look around and think more deeply about the options.
  5. To complete the loop, notes from the discussions should be kept and reviewed at the next meeting, where the process is repeated so that the learning loop continues.

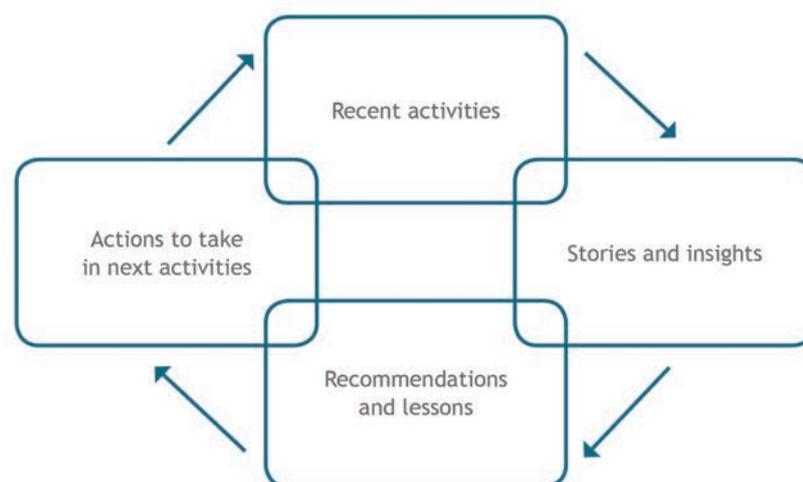


Figure 9. The learning loop.  
(Figure 10, page 38 in the *IDEAS Guide*.)



### Facilitation: Wrap up

- Invite participants to share their reflections on the activity.
- Review and summarise what has been covered in the module:
  - Focusing on the uses and users of the data to be collected.
  - Identifying when data is needed, including when data could be used to make improvements, and when reports are required by stakeholders.
- Open up to questions about the module. Prompt participants to:
  - Raise questions about any new concepts; and
  - Reflect or comment on the ideas discussed.



Encourage participants to share their data-use calendar with funders and other stakeholders. Participants should keep their data-use calendar, as it will help them to develop their evaluation plan in module 8.

## Module 7: Asking the right questions

**Purpose:** The purpose of module 7 is to develop key evaluation questions that state clearly what project teams and stakeholders need to know about the implementation of the project. These should correspond with the identified project goals and project components.

**Recommended time for this module:** 55 minutes

**Materials needed for the activities:** Sticky notes, pens and notebooks.

### Module breakdown:

Presentation: Introduction to module 7 (10 mins)

Activity 1: Thinking again about the uses and users of evaluation (5 mins)

Activity 2: Specifying the key evaluation questions (30 mins)

Facilitation: Wrap up (10 mins)

### Slides:

Slide 37: Module 7 (title slide)

Slide 38: Activity 1: Thinking again about the uses and users of evaluation

Slide 39: Activity 2: Specifying the key evaluation questions

### Presentation: Introduction to module 7

- Explain that to develop evaluation plans that are useful, it's important to clearly state what needs to be known.
- Refer back to the ranking activity from module 2. In most cases, the questions to be asked would relate to the most significant components of the project.



### Emergent:

Remember that projects often need to change (due to changes in priorities, or when you get new information). It is a good idea to return to this activity throughout the project to see if you have new questions or different priorities.



## Activity 1: Thinking again about the uses and users of evaluation

- Using the stakeholder map from module 3, and the discussion notes from module 6, participants work in small groups (ideally project/organisation teams) to discuss the points listed in the *IDEAS Guide*. Participants need to consider the potential involvement of key users when deciding on questions.
- In the *IDEAS Guide*, there is a list of terms associated with this activity. Thinking about 'involvement' in this way may be new, so check that the following terms make sense:
  - informing (telling people the decision);
  - consulting (asking people for their comments and feedback); and
  - collaborating (working as equal partners to make decisions).

**Notes:** Evaluations should be focused on being useful, and this means having a clear understanding of who the users are and what they might use the evaluation for. You can help participants to identify ways in which they could involve the community in the evaluation design, data collection and data analysis processes. However, also prompt them to reflect on keeping their plans for participation in this task realistic and appropriate to the scale of the project by focusing on the key users.

## Activity 2: Specifying the key evaluation questions

- Introduce the list of common types of evaluation questions in media and communication projects on slide 39 and in the *IDEAS Guide*. These are a bit like a 'menu' of questions that teams can select from and adapt.
- In small groups, participants should follow the steps outlined in the *IDEAS Guide*.
- Be sure not to rush the process of reading over and thinking about the sample questions. Suggest that participants use the ranking activity from module 2 to guide their focus.
- Emphasise that the list is just to give some ideas, and encourage participants to adapt the questions to suit their projects.
- The ranking part of the activity (using sticky notes) is important for thinking about feasibility. There is no 'right' number of questions, but in small projects it is better to have 2 to 4 focused questions. Ask probing questions such as: *Are questions needed? Which ones are priorities?*

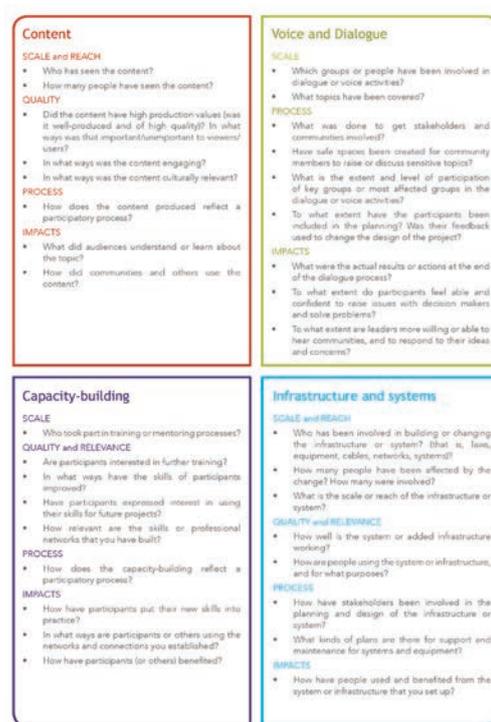


Figure 10. Examples of evaluation questions. (Figure 11, page 41 in the *IDEAS Guide*.)

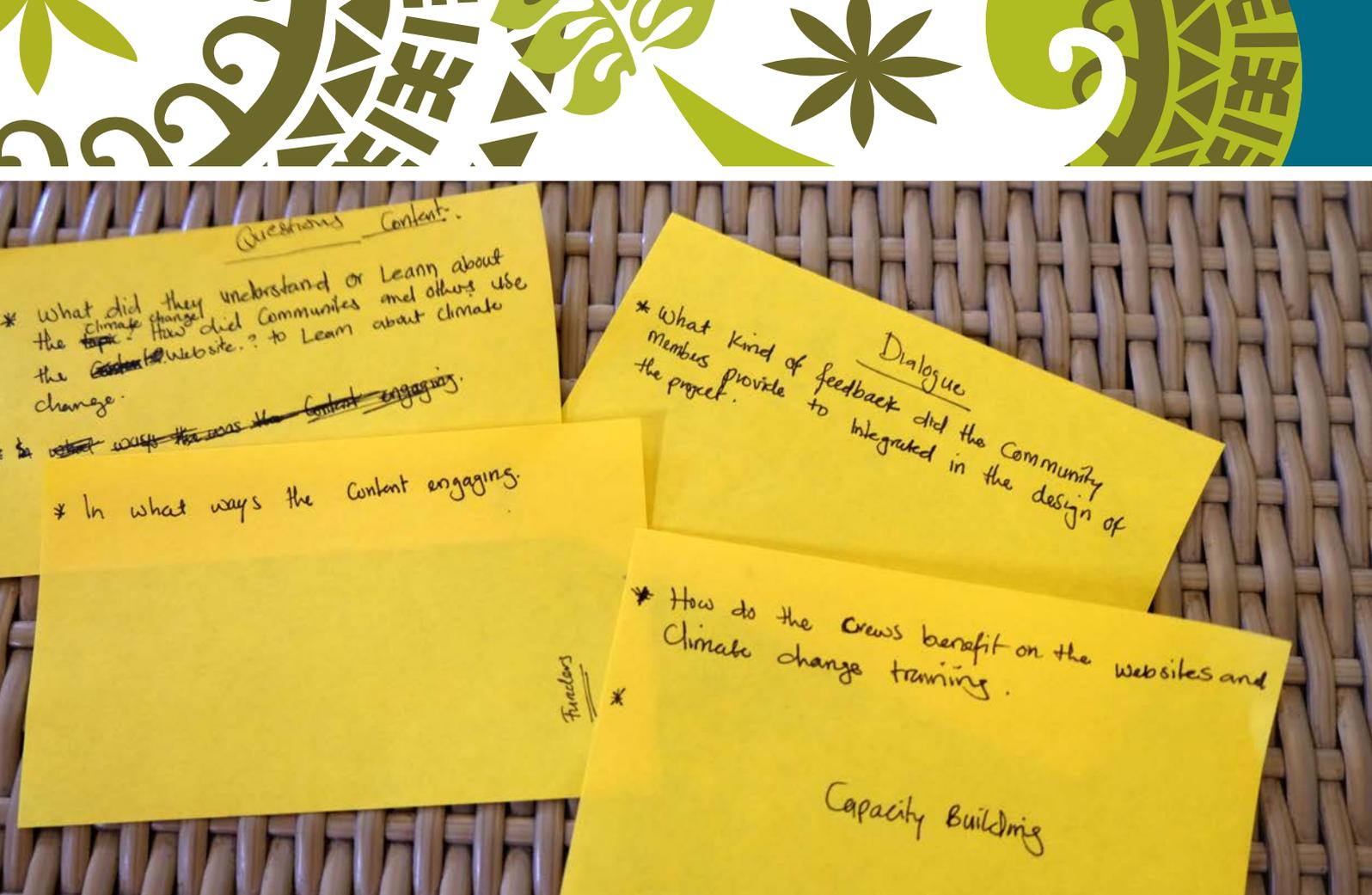


Figure 11. Specific evaluation questions adapted from common evaluation questions.

- Suggest that teams refer to the ranking activity in module 2 and check that the questions developed balance with the significance of the component.
- Ask groups to think about whether it would be worth asking their stakeholders, especially those who might use the findings (the 'users'), about their priority questions. Can participants imagine the perspectives of each stakeholder on their list, and rearrange the priorities according to their interests and uses of the evaluation?

**Notes:** This module is core to the creation of the evaluation plan; it is also the module that participants find most challenging. Make sure that you give it enough time, and that facilitators work closely to support the small groups. It is important to understand and support different levels of familiarity with evaluation and project management.

While the questions are provided as a guide, participants' engagement with the process of rewriting and adapting provides a sense of ownership over the questions.



### Facilitation: Wrap up

- Invite participants to report back on their key questions and to share their reflections on the activity.
- Review and summarise what has been covered in the module:
  - Identifying what you need to know about your project and its progress.
  - Specifying the key evaluation questions which correspond with the components of the project.
- Open up to questions about the module. Prompt participants to:
  - Raise questions about any new concepts; and
  - Reflect or comment on the ideas discussed.



Ask participants to keep their selection of priority evaluation questions on sticky notes for the next module.

## Module 8: Planning information and data collection

**Purpose:** The purpose of module 8 is to select data collection methods that are realistic and will provide the information required to answer the key evaluation questions.

**Recommended time for this module:** 1 hour, 45 minutes

**Materials needed for the activities:** Methods cards (folded), evaluation questions on sticky notes from the previous module, pens and notebooks.

### **Module breakdown:**

Presentation: Introduction to module 8 (5 mins)

Presentation: Tracking project activities and achievements ('monitoring') (5 mins)

Activity 1: Creating a monitoring plan (15 mins)

Presentation: Capturing the unexpected (5 mins)

Activity 2: Choosing evaluation methods using methods cards (30 mins)

Facilitation: Discussion of ethics in data collection and evaluation (15 mins)

Activity 3: Compiling an evaluation plan (20 mins)

Facilitation: Wrap up (10 mins)

### **Slides:**

Slide 40: Module 8 (title slide)

Slide 41: Tracking project activities and achievements ('monitoring')

Slide 42: Activity 1: Creating a monitoring plan

Slide 43: Tool: Capturing the unexpected

Slide 44: Activity 2: Choosing evaluation methods using methods cards

Slide 45: Ethics in data collection and evaluation

Slide 46: Activity 3: Compiling an evaluation plan

### **Presentation: Introduction to module 8**

- The focus of this module is on selecting the best data collection options to help answer the key questions.

### **Presentation: Tracking project activities and achievements ('monitoring')**

- Use slide 41 to explain the difference between tracking (or 'monitoring') and evaluation. There is some overlap but 'tracking' is more about keeping good records of activities that can signal whether or not you are on track. 'Evaluation' answers your key questions.
- Go through some examples of tracking and monitoring on slide 41 and in the *IDEAS Guide*.



## Activity 1: Creating a monitoring plan

Use slide 42 to explain that in this activity, teams will think about the things they can record and track, and then fill in the monitoring plan template in the *IDEAS Guide*.

**Notes:** Prompt participants to consider what 'data' they already collect, such as attendance sheets, photographs, etc., in order to consider how completing these activities in a more structured way might benefit their work.

Participants may not finish filling in the table. This is something that can be finished on day 3 or at an alternative time.

## Presentation: Tool capturing the unexpected

- Using slide 43, introduce the unexpected event tracking tool as a particularly useful tool for innovative projects where things are less predictable. (Note: This is not intended as a workshop activity, but rather, as a tool teams can take away for future use.)
- Explain that both positive and negative unexpected events can be opportunities for learning.
- If possible, share some examples of unexpected events from your own experience.

## Activity 2: Choosing evaluation methods using methods cards

- Introduce the activity and explain that the purpose is to select methods that help to answer the key questions.
- Introduce the methods cards and point to the key features on the cards: the cards are colour-coded for the type of method (qualitative, quantitative or participatory – qualitative and quantitative data will be talked about more in module 9); the symbols indicate the amount of time and the skills required; and the examples describe how these might work in practice.
- Illustrate how you might look at a question (you could use an example from one of the groups) and think about which methods cards might be useful for answering.
- Go through the main steps using the abbreviated points on slide 44 and/or the full steps in the *IDEAS Guide*. Emphasise that the process should lead to quite a lot of discussion and negotiation.
- In small groups (ideally project teams), participants should work through the steps in the *IDEAS Guide*.
- Use the prompts in step 5 to help teams reflect on how well the questions and methods match, the mix of methods and perspectives, and the feasibility.



### Realistic:

The most effective evaluation approaches are those that are simple, practical, responsive, robust and useful.



**Notes:** As a facilitator, take the time to familiarise yourself with the methods cards, as participants will be reviewing them and might ask for help understanding which method card best answers their questions.

When the groups decide on their methods, this is a good moment to note that they now have a draft evaluation plan that they can take home with them – it just needs to be written up (which they should have time to begin doing at the end of this module).

### Facilitation: Discussion of ethics in data collection and evaluation

- Using slide 45, recap ethical practices and link this to evaluation. Introduce privacy as a key issue in evaluation and go through the points in the *IDEAS Guide*.
- Where possible, use examples of real life dilemmas from your experience, and ask participants to share their own experiences.

### Activity 3: Compiling an evaluation plan

This activity basically provides an opportunity to document the decisions made into an evaluation matrix. It brings together decisions made in module 6 on timing, in module 7 on questions, and in the current module in relation to methods and ethical issues.

It is unlikely that participants will finish this task in the time available on day 2. If you are running the extra half day on day 3, completing this evaluation plan can be the focus of that extra time.

Evaluation question	Methods to collect data	When?	Where?	Who? (Or what?)	How many?	Ethical considerations
E.g.: What was the audience's reaction to the content?	Focus group/group discussion	Aug.	Local village cinemas	Facilitator & audience	<ul style="list-style-type: none"> <li>• 10 audience members per screening</li> <li>• 5 screenings, 1 group discussion in each</li> </ul>	Representation: Do people still consent now that they have seen the film?
	Individual short questionnaire or survey	Aug.	Local village cinemas	Volunteers from audience	<ul style="list-style-type: none"> <li>• 30 audience members per screening</li> <li>• 5 screenings</li> </ul>	Are you keeping people's responses confidential?
E.g.: Is the content nationally available and publicised?	Monitor distribution through mapping activity	Aug-Dec.	Nationally	Distribution partners	10 urban distribution centres	Do people consent to having their images used to promote the film?
	Monitor media coverage through content analysis	Aug-Dec	Nationally	Radio: NBC TV: Kundu2, EmTV Print: Post Courier, National, Stella Magazine	6 media outlets	Are you keeping your data secure and safe?

Figure 12. An evaluation plan.  
(Table 6, page 45 in the *IDEAS Guide*.)

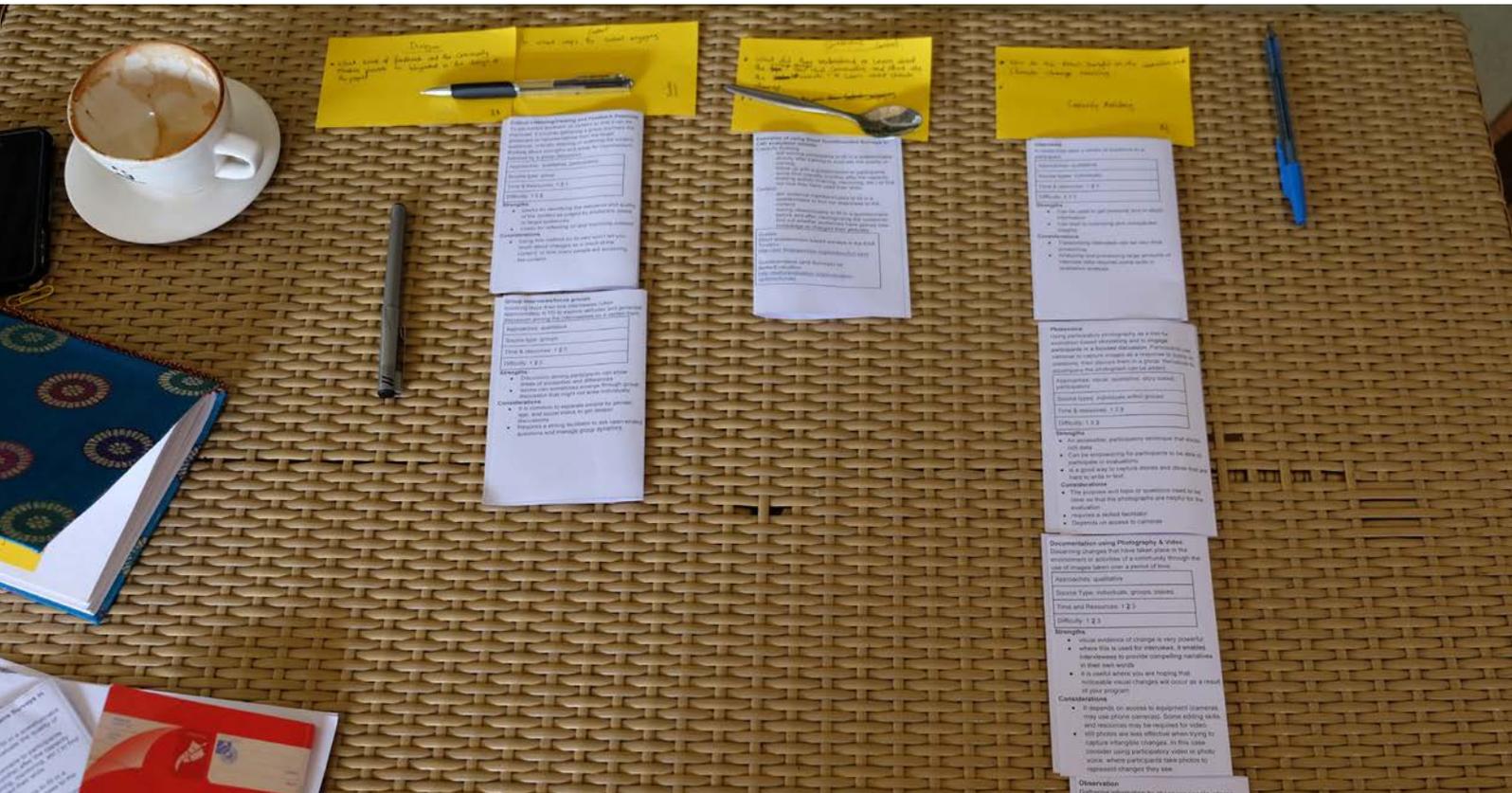


Figure 13. Evaluation questions matched to corresponding methods cards.

### Facilitation: Wrap up

- Invite participants to share their reflections on the activities.
- Review and summarise what has been covered in the module:
  - Developing plans for monitoring and tracking unexpected events.
  - Introducing new methods.
  - Selecting methods that are realistic and can provide answers to the key evaluation questions.
  - Creating the foundations of an evaluation plan.
- Open up to questions about the module. Prompt participants to:
  - Raise questions about any new concepts; and
  - Reflect or comment on the ideas discussed.



Remind participants that when they have completed their evaluation plan, they can share it with their stakeholders and discuss their plans with them.

## Module 9: Making sense of data

**Purpose:** The purpose of module 9 is to demystify data analysis, and to provide strategies for making sense of data and patterns.

**Recommended time for this module:** 1 hour, 25 minutes

**Materials needed for the activities:** Sticky notes, printed evaluation questionnaires, notebooks and pens.

### **Module breakdown:**

Presentation: Introduction to module 9 (5 mins)

Facilitation: Managing data (5 mins)

Presentation: Making sense of data (5 mins)

Activity: Workshop evaluation (20 mins)

Activity: Analysing workshop evaluation data (30 mins)

Activity: Creating a data management and analysis plan (10 mins)

Facilitation: Wrap up (10 mins)

### **Slides:**

Slide 47: Module 9 (title slide)

Slide 48: Managing data

Slide 49: Managing data: An example template

Slide 50: Making sense of data (analysing data)

Slide 51: Activity: Analysing workshop evaluation data

Slide 52: Activity: Data management and analysis plan

### **Presentation: Introduction to module 9**

- Introduce the topic of data analysis.

### **Facilitation: Managing data**

- Open the discussion by asking participants if they have ever experienced situations where data was lost.
- Follow on by asking participants what strategies they have used to manage data (both questions are on slide 48).
- Point to the example templates in the *IDEAS Guide*, and on slide 49, for labelling data.



### Presentation: Making sense of data

1. Introduce the terms 'qualitative data' (data based on words, stories and images) and 'quantitative data' (data based on numbers) (slide 50).
2. Check for questions or confusion before moving on. Use examples of methods chosen in the previous module to explain these concepts (the methods cards indicate whether data generated is qualitative or quantitative).
3. Introduce the term 'data analysis' and explain this as being a process of making sense of data that involves looking for patterns, as well as identifying things that don't fit the pattern. The ways in which patterns are identified depends on whether the data is based on numbers, or based on words and stories.
4. Explain that because it is hard to demonstrate how to do data analysis at this point (since teams don't have any project data), in this module we will create some data to analyse together by evaluating the workshop.



#### Complex:

The outcomes and social changes relating to communication and media projects are complex and often unpredictable. For this reason, it is important to be flexible in designing and evaluating, and to stay attuned to unexpected things that occur, both positive and negative.

### Activity: Workshop evaluation

- Ask participants to fill in the workshop evaluation questionnaire (appendix 5).
- Facilitators should leave the room or at least step away.
- Nominate someone to collect the completed questionnaires.

### Activity: Analysing workshop evaluation data

1. Explain that participants should imagine that the facilitators went through the whole *IDEAS Guide* and came up with three key questions about the workshop (to be answered through a post-workshop questionnaire). The questions are:
  - a. How successful was the workshop?
  - b. How could the workshop be improved?
  - c. How could the resources be improved?
2. Split participants into two groups (mix up project teams if appropriate). At least one facilitator should sit with each group.
3. Give one group the multiple choice sheets (quantitative data) and the other the short answer questions (qualitative data).
4. Follow the steps outlined in the *IDEAS Guide* to undertake the data analysis steps appropriate for each kind of data.



Figure 14. Qualitative analysis activity thematically grouping workshop feedback.



Figure 15. Group discussions during a workshop to analyse the data.

5. When the group doing the quantitative analysis has finished, ask them to write key points on sticky notes (one point per note). For example, 'x number out of the total agreed that ...'.
6. These key points can be added to the collection of points from the qualitative analysis.
7. Ask someone from each group to briefly summarise the key steps they followed to analyse the data for the other group.
8. Facilitate a discussion about how the two kinds of data complement each other, or perhaps suggest additional questions that need to be asked.
9. Facilitate a discussion about anything that was confusing about the data.
10. Explain that the last step is to make a summary of the analysis. Demonstrate how this is done by summarising the workshop evaluation analysis drawing on the analysis just done.

**Notes:** Consider the dynamics of the two groups. If possible, try to arrange it so that there is someone who is used to writing reports or analysing data in each group. They might be more comfortable taking on a leadership role for this activity.



## Activity

- Show slide 52 (a tool for creating a data management and analysis plan).
- In small groups (ideally project teams), participants should fill in the data management and analysis plan in the *IDEAS Guide*.
- If there is not enough time to finish this during the module, this can be completed on day 3.

**Notes:** *New questions can often emerge after data analysis. Remind participants that if new questions arise, they can go back to module 8 to decide what methods might be helpful to get answers.*

Question	Plan
Who in your team will be responsible for labelling and storing the data?	
Where will you keep the data?	
What kinds of information (age, date of collection, gender and demographics) will you need to collect about the participants in your data collection?	
What forms of labelling will you need? Think about a system for file names for digital information, or a spreadsheet or table, or use a folder to collect this.	
What kinds of analysis will you do given the methods you are using for your evaluation?	
What kinds of skills and resources will you need to complete your evaluation analysis?	
Who from the project team will be involved in the analysis? Which stakeholders might be involved?	
How will you make back-up copies of the data in case of damage or loss to the originals?	
Where will back-ups be stored? Who will be responsible?	

Figure 16. Data management and analysis plan.  
(Table 9, page 60 in the *IDEAS Guide*.)

## Facilitation: Wrap up

- Invite participants to share their reflections on the activities.
- Review and summarise what has been covered in the module:
  - Practical ways of making sense of data - both data based on numbers and data based on words and images.
  - Some tips for managing data.
- If you haven't already, show slide 52 (a tool for creating a data management and analysis plan) and, if you are running a third day, suggest that teams work to fill out this table on day 3.
- Open up to questions about the module. Prompt participants to:
  - Raise questions about any new concepts; and
  - Reflect or comment on the ideas discussed.

## Module 10: Reporting and sharing

**Purpose:** The purpose of module 10 is to open up options for traditional and non-traditional ways of reporting and sharing findings.

**Recommended time for this module:** 50 minutes

**Materials needed for the activity:** Reporting cards (printed and folded), a copy of the Rugby Plus video (see appendix 1), other examples of innovative or interesting reporting methods (optional), stakeholder maps, data-use calendars, pens and notebooks.

**Module breakdown:**

Presentation: Introduction to module 10 (10 mins)

Presentation and facilitation: Traditional and innovative reporting options (5 mins)

Activity: Choosing reporting options using reporting cards (25 mins)

Facilitation: Wrap up (10 mins)

**Slides:**

Slide 53: Module 10 (title slide)

Slide 54: Planning how to share your findings

Slide 55: Video using 'vox-pop': An example of non-traditional reporting

Slide 56: Activity: Choosing reporting options using reporting cards

### Presentation: Introduction to module 10

- Explain that reporting and sharing is an important part of learning as it helps to ensure that stakeholders, especially the key users, can use the findings.

### Presentation and facilitation: Traditional and innovative reporting options

- Use slide 54 to introduce the difference between traditional and non-traditional (or 'innovative') ways of reporting.
- You may want to outline any specific reporting requirements from the funders' perspective at the outset.
- If possible, use your own experience in reporting to give examples.
- Open up a discussion on experiences of traditional and non-traditional methods participants may have used or seen.
- Play the pre-cued Rugby Plus video (or other examples of innovative reporting that you know of).
- Point to table 10 in the *IDEAS Guide* that outlines what is usually included in a traditional report.



**Notes:** It helps if facilitators have some idea about funders' reporting requirements prior to the workshop in order to provide participants with advice. Funders should be encouraged to be as open and flexible as possible within their own constraints, since it is likely that all stakeholders, including funders, will get better insights if the grant recipients share their progress updates in ways they are comfortable with. Whether traditional or non-traditional reporting methods are selected by participants, emphasise the importance of checking with stakeholders (especially funders) to make sure the choices fit with expectations and requirements.

### Activity: Choosing reporting options using reporting cards

- In small groups (preferably in project teams), distribute one set of reporting cards per group.
- Groups should work through the steps for this activity as outlined in the *IDEAS Guide*.

#### Facilitation: Wrap up

- Invite participants to share their reflections on the activity.
- Review and summarise what has been covered in the module:
  - Introduction to options for traditional and non-traditional reporting and sharing of evaluation findings.
  - Selection of realistic and appropriate methods for sharing evaluation findings with stakeholders.
- Open up to questions about the module. Prompt participants to:
  - Raise questions about any new concepts; and
  - Reflect or comment on the ideas discussed.

# Conclusion

**Purpose:** The purpose of the concluding session is to discuss and reflect on the workshop's activities and discussions, and to celebrate achievements.

**Recommended time for this stage:** 20 minutes

**Materials needed:** Appointment sheet (if running day 3 with appointments), laptop and editable slides or flip chart paper/whiteboard and markers.

**Session breakdown:**

Facilitation: Reflection on key insights and wrap up (20 mins)

**Slides:**

Slide 57: Concluding discussion

Slide 58: Key insights

## Facilitation: Reflection on key insights

- Refer back to the sailing metaphor.
  - Have there been in changes in the destination? Are there any new ideas about how to get there?
  - Do teams feel more confident about going out into the unknown now that they have chosen some navigation and observation tools?
- Conclude by developing a list of the group's key insights about learning and evaluation from the past two days. The insights can be typed into the PowerPoint presentation (slide 58), or written on a whiteboard or on flip chart paper.
- Wrap up:
  - Outline the plans for day 3 (half-day) appointments (if you are running these) to finalise writing-up the evaluation plans.
  - Ask people to confirm their time on the appointment sign-up sheet.
  - Thank everyone for his/her contributions.
  - Encourage participants to share contact details and to support each other as they go along their journeys.
  - Congratulate participants on developing an evaluation plan.
  - Close the workshop.



**Notes:** Try to share the list of key insights created by the workshop group with participants as a follow-up – this can be framed as a co-created resource that summarises the learnings from the workshop.

It is important at the end of the workshop to provide a sense of closure and to celebrate participants' achievements. Facilitators should also think about how to support continued peer-learning among workshop participants beyond the workshop. Can you:

- link new grant recipients with other organisations (ideally former grant recipients) to form a 'community of practice' or 'learning circle', or a mentor or buddy project?
- provide or enable ongoing coaching, review and reflection?
- share emerging findings for a 'peer review' (feedback and ideas from fellow practitioners)?

The BetterEvaluation website has more information and ideas about capacity-building options. See [http://betterevaluation.org/en/plan/manage\\_evaluation/evaluation\\_capacity](http://betterevaluation.org/en/plan/manage_evaluation/evaluation_capacity).

## Day 3 (Optional)

**Purpose:** The idea behind the extra half-day is to allow time for participants to review the decisions made and to compile these into a draft evaluation design with the support of facilitators.

**Recommended time for this stage:** 3-4 hours

**Materials needed:** Participants' notes and *IDEAS Guide*, appointment sheet (optional), meeting space(s), notebooks and pens.

**Slides:**

N/A

The final half-day of the workshop is intended to allow participants additional time to work back through the content covered and the decisions made at their own pace, with facilitators on-hand to offer support and advice.

Some key activities, such as compiling the evaluation plan, may not have been completed during days 1 and 2. Further decisions or maps made in earlier modules might benefit from some revision based on new insights from later modules.

There are many different ways in which this session could be organised. All participants may meet in the same location and work in self-directed ways with facilitators 'floating' and responding to requests for support as needed. Alternatively, appointments can be made at the end of day 2 for focused time with facilitators. A combination of these two scenarios is also possible.

If a third half-day session is not feasible, ensure that adequate follow-up support is available.



## Appendix 1: Additional files and resources

### Slides

A PowerPoint file with slides is available at [http://betterevaluation.org/resources/guide/IDEAS\\_Guide](http://betterevaluation.org/resources/guide/IDEAS_Guide). Look for the *IDEAS\_Workshop\_Slides.ppt* file. If you have any difficulty accessing it, please contact one of the authors.

As with the entire *IDEAS* package, these slides are licensed under a Creative Commons license (non-commercial, attribution, share alike). Users are therefore welcome to adapt the slides to suit, provided there is attribution to the authors and links to the original source.

### Rugby Plus Video

A video made by the Rugby Plus project is suggested as an exemplar for reporting methods. It is available on YouTube at <https://www.youtube.com/watch?v=RkEUpX7gSt4>. However, for situations where internet access is limited, a downloadable version is available on BetterEvaluation as part of the *IDEAS* package at [http://betterevaluation.org/resources/guide/IDEAS\\_Guide](http://betterevaluation.org/resources/guide/IDEAS_Guide).

### Other editable/downloadable files

An MS Word file is available for facilitators to download at [http://betterevaluation.org/resources/guide/IDEAS\\_Guide](http://betterevaluation.org/resources/guide/IDEAS_Guide). This download includes:

- an sample schedule (brief);
- a sample schedule (detailed);
- an evaluation form; and
- an appointment sheet.

In addition, this same webpage also includes downloadable files that accompany the *IDEAS Guide* (for participants), including the methods cards and reporting cards, and an MS Word file that includes:

- the learning loop;
- the unexpected event tracking tool;
- data label templates; and
- an evaluation plan template.

### Books, literature and websites

See appendix 4 in the *IDEAS Guide* for useful books and websites.

## Appendix 2: Schedule

Day 1	
9:00	Welcome and introduction Module 1: Understanding the role of evaluation and learning in innovation
11:05	Morning tea
11:20	Module 2: Defining your project goals and priorities
12:45	Lunch
1:15	Module 3: Understanding the people connected to the project (stakeholders) Module 4: Stakeholder participation and communication
3:05	Afternoon tea
3:20	Module 5: Doing the right thing by the people involved with the project (ethics) Brief recap and wrap up of the day
5:00	Finish day 1
Day 2	
9:00	Introduction, recap of the previous day Module 6: Planning data-use
10:35	Morning tea
10:50	Module 7: Asking the right questions Module 8: Planning information and data collection
12:45	Lunch
1:15	Module 8 (continued) Module 9: Making sense of data
3:25	Afternoon tea
3:40	Module 10: Reporting and sharing Brief recap and wrap up of the workshop
5:00	Finish day 2
Day 3	
9:00	Working individually or in teams on finalising evaluation plans. Appointments and 1-on-1 consultations with facilitators.
12:30	Finish day 3



## Appendix 3: Icebreaker activities

The examples below are good icebreakers for people who do not know each other well.

### True, True, False.

Split your group into two and, if possible, have them facing each other. Call them Team A and Team B. Give them index cards or bits of paper that all look the same. Have them write down three things about themselves, two of which are true and one of which is false. Take all the cards and put them in two piles, one for each team. Shuffle them.

Choose one of Team A's cards and read aloud for Team B. Have them confer with each other to choose which one is false, then ask the anonymous person to reveal which one of their answers is false. Give points whenever teams choose the false answer. Take turns between teams until you have used all the cards. Then reveal which team has won the most points. By the end you will have learnt some interesting facts about each other.

### Things in common

Get people to mingle around the room and find a partner who they don't know very well. Have them talk to each other to find three things that they have in common (things that would be common to all people in the room – like living in the same city – don't count). Encourage people to ask about and share things that might not at first be apparent. When they have done this, get them to call out. The first pair to do so wins the game, and has to tell everyone what they have in common. Get the others who didn't win the game to share what they have found that they have in common.

### Other resources

- 40 Icebreakers for small groups [https://insight.typepad.co.uk/40\\_icebreakers\\_for\\_small\\_groups.pdf](https://insight.typepad.co.uk/40_icebreakers_for_small_groups.pdf)
- 34 Quick icebreakers <http://icebreakerideas.com/quick-icebreakers/>



## Appendix 4: Notes on the evaluation framework

The *IDEAS Guide* builds upon the following principles of evaluation for communication for development:

**Participatory:** A participatory approach means that project design, evaluation and learning processes are undertaken in partnership with partners, community members, stakeholders and others. It recognises that local participants and technical experts all have experience and knowledge that is valuable to the project. The processes used in design, learning and evaluation should be culturally and socially appropriate, creative, and based on mutual trust. The process aims to continually and actively engage people through two-way communication and dialogue.

**Holistic:** Taking a holistic approach means paying attention to the wider systems, structures and contexts within which the project operates. This approach means understanding and responding to the local communication context (or communicative ecology), and other social, cultural, economic, technological, organisational and institutional systems and contexts.

**Complex:** The framework recognises that media and communication initiatives, and the processes of social change, are often complex and unpredictable, with multiple causes and factors at play. Media and communication projects often involve people and organisations with different perspectives and agendas.

**Critical:** Taking a critical approach means actively addressing issues of power and inequity with attention to gender, class, ethnicity, age, education, community status, and other relevant differences that affect unequal voice among participants. As far as possible, issues of power and inequity are openly addressed in the design and evaluation. The evaluation plan is based on an awareness of the strengths and limitations of various evaluation approaches, and uses strategies to manage differences in power.

**Emergent:** Social change and the outcomes of media and community projects are often dynamic and unpredictable. Evaluation approaches therefore need to be flexible, participatory and creative. They also need to capture unexpected outcomes and ripple effects that go beyond initial assumptions. This new information should inform changes to the project direction and activities.

**Realistic:** The most effective evaluation approaches are those that are simple, practical and useful. The methodologies and methods must be grounded in local realities. Implementation requires openness, freedom, flexibility and practicality.

**Learning-based:** Evaluations should be focused on being useful and on supporting learning. Learning depends on good communication, cooperation, collaboration and trust between all those involved. A learning-based approach encourages continual learning and experimentation to improve projects and practices. The aim is that learning becomes fully integrated into organisations' routines.

For more information on these principles refer to Lennie, J. and Tacchi, J. (2013). *Evaluating communication for development: A framework for social change*. Routledge, New York.

## Appendix 5: Evaluation forms

### Workshop and toolkit evaluation questionnaire

#### Multiple choice questions

Please circle your response to the items.

1 = 'Strongly disagree', or the lowest, most negative impression

2 = 'Disagree'

3 = 'Neither agree nor disagree', or an adequate impression

4 = 'Agree'

5 = 'Strongly agree', or the highest, most positive impression

Choose N/A if the item is not appropriate or not applicable to this workshop. Your feedback is sincerely appreciated. Thank you.

#### Workshop

1. This workshop lived up to my expectations.	1	2	3	4	5	N/A
2. The pace of this workshop was appropriate.	1	2	3	4	5	N/A
3. The facilitators were well prepared.	1	2	3	4	5	N/A
4. I will be able to use what I learned in this workshop.	1	2	3	4	5	N/A

#### IDEAS Guide

5. The <i>IDEAS Guide</i> lived up to my expectations.	1	2	3	4	5	N/A
6. The <i>IDEAS Guide</i> is relevant to my projects and work.	1	2	3	4	5	N/A
7. I can imagine how I could use the <i>IDEAS Guide</i> in my work.	1	2	3	4	5	N/A
8. The pace and length of the <i>IDEAS Guide</i> is appropriate.	1	2	3	4	5	N/A
9. I was able to understand the activities in the <i>IDEAS Guide</i> .	1	2	3	4	5	N/A



### Short answer questions

10. In what ways will you be able to put the things you have learned from the workshop into practice? Please give examples.

11. What improvements would you recommend be made to this workshop?

12. What is most valuable about the *IDEAS Guide*?

13. What is least valuable about the *IDEAS Guide*?

14. What improvements would you recommend be made to the *IDEAS Guide*?

15. What do you think should happen next?



## Appendix 6: Appointment sheet

1	9:00 - 9:45	
2	9:45 - 10:30	
3	10:30 - 11:30	
4	11:30 - 12:30	



## Glossary

**analysing** Making sense of data by looking for patterns and trends.

**data** Information that is collected systematically.

**evaluation** Gathering information to tell you if your projects are successful and how they might be done better.

**evidence** Data and information that is gathered and analysed systematically, that can be used to show what is working, or not working, to funders and other stakeholders.

**monitoring** Information that you collect during a project that signals if you're on the right track or not.

**qualitative** Data or information based on words or stories.

**quantitative** Data or information based on numbers.

**stakeholders** People, groups and organisations that have an interest in, or are involved in, your project or activity.



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