

Perspectives on Impact Evaluation

Approaches to assessing development effectiveness

Pre-Conference Workshops Planner

Cairo, March 29-31

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Cairo Pre-Conference Planner, March 29-31

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13.00-14.00
14.00-18.00

Lunch

W13. Most significant change technique

Jess Dart
(Clear Horizon)

W14. Quasi-experimental approaches to attribution analysis

Sebastian Martinez
(World Bank)

Meta-Analysis ctd.

Jeff Valentine (Campbell Collaboration)

Challenges in Agricultural Development for Impact Evaluation ctd.

Impact Evaluation for Development Effectiveness ctd.

W15. Designing a contribution analysis for assessing expected impacts

Eric Monnier
(Geneva University)
Laurent Raffier
(Consultant)

18.30-20.00
Tuesday
March 31
09.00-12.30

NONIE Reception (by invitation)

W16. NONIE Workshop: More and better impact evaluation for learning what works in raising agricultural productivity – Problem solving session to address knowledge gaps

Ximena Del Carpio
(World Bank)
Paul Gertler
(UC Berkeley)
Máximo Torero (IFPRI)

W17. Designing and Implementing Household Surveys

Kathleen Beegle,
Kinnon Scott
(LSMS team/
World Bank)

W18. Mixed methods and social transformation

Donna Mertens (Gallaudet University) and Bagele Chilisa (University of Botswana)

W19. Public Expenditure Tracking Surveys

Bernard Gauthier
(HEC Montreal/World Bank)

W20. Designing theory-based impact evaluations

Howard White (3ie)

W12. Mixed methods in impact evaluation

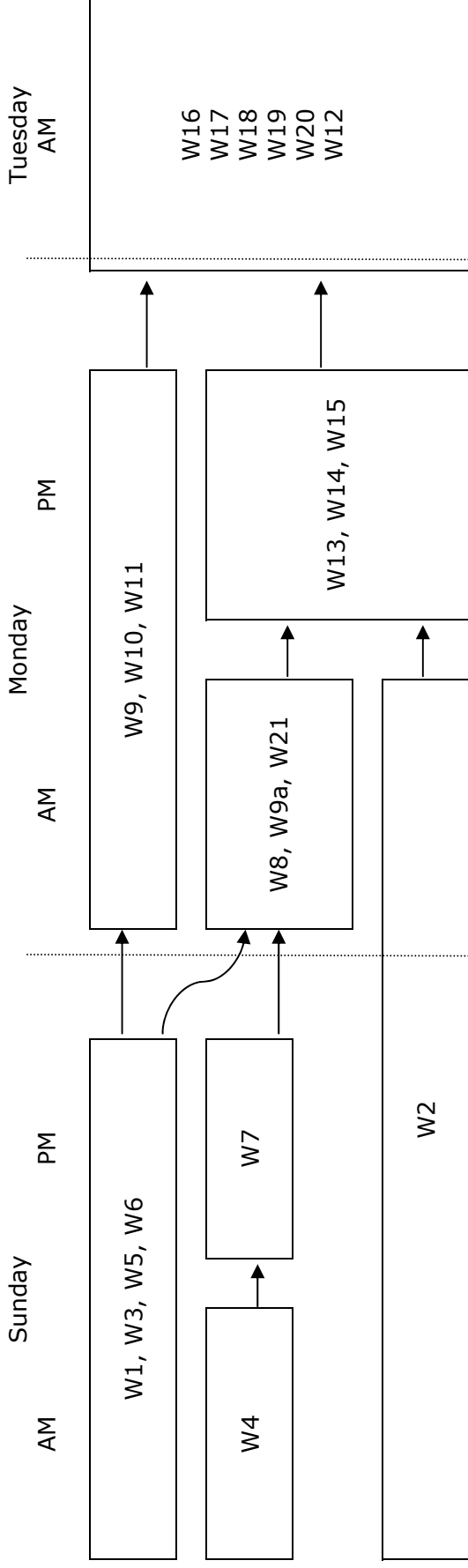
Time: 11:00 – 13:00
Jennifer Greene
(University of Illinois)

12.30-14.00

Lunch

Conference registration (open all morning)

AfrEA-NONIE-3ie Impact Evaluation Conference Workshop schedule planning



Participants can select one workshop in one of the boxes starting Sunday AM, and then proceed to select one workshop from a box to the right (connected by an arrow), and so on until Tuesday AM.

Quick reference list

W1	Ten evaluation concepts to better evaluation	W8	Ten Steps To A Results Monitoring and Evaluation System To Achieve Development Impact	W15	Contribution analysis
W2	RCTs	W9	Meta-analysis (9a AM only)	W16	NONIE agricultural IE session
W3	Realist evaluation and realist synthesis	W10	Agricultural IE	W17	Household surveys
W4	Participatory planning, evaluation & learning	W11	Impact Evaluation for Development Effectiveness	W18	Mixed methods and social transformation
W5	Real world evaluation	W12	Mixed methods in impact evaluation	W19	Public expenditure tracking surveys
W6	Monitoring? Evaluation? Impact evaluation?	W13	Most significant change techniques	W20	Theory-based impact evaluation
W7	Learning with constituents	W14	Quasi-experimental approaches	W21	For whom and why do we conduct evaluation?

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Workshop 1

Making evaluations matter: Ten evaluation concepts that will help you become a better evaluator

When: Sunday, March 29 from 9:00 to 18:00

Where: Room 1

Number of participants: 40 people

Level: Beginners, Intermediate evaluators

Language: English with simultaneous interpretation in French and Arabic

Conducted by: Sanjeev Sridharan from the Centre for Research on Inner City Health and Benita van Wyk from Feedback Research & Analytics

Course objectives: This workshop discusses ten evaluation concepts that can help understand how interventions work and also design more influential evaluations. The focus will be on identifying key concepts that are critical in understanding how development programs *can* work. These concepts will be identified using real world examples of evaluations of development effectiveness. The workshop will be designed to appeal to a wide variety of evaluators.

Methodology: The participants will be invited to provide feedback and share examples of evaluations that they have found influential before the workshop.

Content: The workshop will cover the following topics: learning framework, intervention complexity, internal validity, external validity, mechanisms, models of causation, heterogeneity, theory of change, and evaluation designs.

Facilitators bios

Sanjeev Sridharan is Director of the Evaluation Program at the Centre for Research on Inner City Health and Associate Professor of Health Policy, Management and Evaluation at the University of Toronto. Prior to this, he was the Head of the Evaluation Programme and Senior Research Fellow at the University of Edinburgh. Sanjeev has a strongly interdisciplinary background with a Doctorate in Social Ecology from the University of California at Irvine, Master's in Public Policy from Purdue University, and a Bachelor of Technology degree in Civil Engineering from the Indian Institute of Technology. He is an Associate Editor of the American Journal of Evaluation.

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Benita van Wyk is a founding partner of Feedback Research & Analytics, a South African consultancy providing evaluation, research and data analysis services. Ms. Van Wyk is responsible for the design, implementation & management of monitoring and evaluation projects and has conducted various evaluations of Education, Youth Development, Income Generation and HIV/AIDS initiatives in South Africa. She has experience in the sophisticated qualitative and statistical analysis of education data, health behaviour survey data, skills-audit data, diagnostic organizational audit data and project data from global monitoring databases. She currently serves as treasurer for the South African Monitoring and Evaluation Association (SAMEA).

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Workshop 2 Randomized Evaluation Workshop

When: Sunday, March 29 from 9:00 to 18:00 and Monday, March 30 from 9:00 to 13:00

Where: Room 2

Number of participants: 60 people

Level: Participants should be comfortable with statistics and be familiar with the concepts of sampling distribution, standard deviation, and bias.

Language: English with simultaneous interpretation in French and Arabic

Conducted by: Staff and affiliates of Independent Project Analysis (IPA) and Abdul Latif Jameel Poverty Action Lab at MIT (J-PAL)

Course objectives: In this workshop, J-PAL members will share their accumulated experience, and teach participants how to conceive, design, and run successful randomized evaluations. With this knowledge, participants will be able to increase the share of randomized evaluations in their portfolio of program evaluations. The workshop caters to those who would like to learn more about randomization as an effective methodology to measure impact

Content

Unit 1 - Why Randomize: The lecture will review why randomized evaluation is considered the “gold standard” of evaluation. It will cover the distinction between correlation and causation, and the concepts of the counterfactual and selection bias. The concept of stratification will also be introduced.

Unit 2 – How to Randomize: Participants will learn a range of techniques that can be used to introduce an element of randomization—and thus allow for a randomized evaluation—into different types of programs in a way that fits with programmatic constraints.

Unit 3 - Ensuring the Integrity of the Evaluation: The final lecture will go through many of the key threats to the validity of an evaluation.

Facilitators bios

Rebecca Thornton is a J-PAL Affiliate and Assistant Professor at the University of Michigan. She has run evaluations in Kenya, Malawi and Nepal on health and education.
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Luc Behaghel is a Researcher at the Paris School of Economics and J-PAL Europe. His research examines income inequality and labor markets in France.
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Annie Duflo is Research Network Director at IPA and was the Executive Director of the Centre for Micro Finance at the Institute of Financial Management and Research in Chennai, India.
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Kamilla Gumede is a J-PAL Research Associate and was a Director of Policy Research at the South African National Treasury.
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William Pariente is a post doctoral fellow at J-PAL Europe. His current research focuses on access to credit, poverty, and health issues in Morocco, Pakistan and France.
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Elise Huiller, Post doctoral fellow at J-PAL Europe. Her research focuses on education (in Romania), youth entrepreneurship (in France) and banking reform (in Moldova)
Elise Huillery ehuillery@povertyactionlab.org

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Workshop 3

Using realist evaluation and realist synthesis for impact evaluation

When: Sunday, March 29 from 9:00 to 18:00

Where: Room 3

Number of participants: 30 people

Level: Intermediate

Language: English with simultaneous interpretation in French and Arabic

Conducted by: Patricia Rogers from Collaboration for Interdisciplinary Research, Consulting and Learning in Evaluation (CIRCLE) at the Royal Melbourne Institute of Technology.

Course objectives: Realist approaches ask “What is it about this program that works for whom in what circumstances?” drawing on both quantitative and qualitative evidence, success and failure, and areas of similarity and difference. The workshop will introduce participants to the logic and techniques of realist evaluation for individual evaluations and the use of realist synthesis for summarizing results across multiple sites and multiple evaluations and research projects. It will address the issue of what evidence is considered sufficiently rigorous to include in a synthesis if the hierarchy of methods is seen as inappropriate.

Content: The course will cover the following topics: (i) key features and processes of realist evaluation and realist synthesis; (ii) ways to assess the rigor of evaluations and research in order to incorporate a range of evidence in a synthesis; and (iii) how to develop initial context-mechanism-outcome configurations relevant to their area of work.

Methodology: This workshop will be a mix of expert presentations and experiential learning. Participants will take part in group exercises working through examples of realist evaluation and realist synthesis. It will use examples drawn from a range of areas including corrections, community services and health.

Facilitator bio

Patricia Rogers –Professor of Public Sector Evaluation at the Royal Melbourne Institute of Technology, she leads an interdisciplinary research program on evidence-based policy and practice in health and well-being. Her work has focused particularly on methods for generating evidence about complicated and complex interventions where the evaluation question needs to be “What works for whom in what circumstances” and supporting evidence uptake and translation. Her publications have included entries on accountability, program logic and logic models for the Encyclopedia of Evaluation, and a chapter on using evaluation for improvement and organizational learning for the Sage Handbook of Evaluation. Most recently she has written on the use of program logic for complex and complicated interventions, and the use of qualitative cost benefit analysis for complex, emergent programs. She has worked for more than 20 years in public sector evaluation, across a wide range of programs (including development, early childhood, education, Indigenous housing, criminal justice, and agriculture), levels of government (national, state and local) and multilateral organizations, including projects with NONIE, UNDP, World Bank Institute, Development Bank of Southern Africa, Consultative Group on International Agricultural Research and the Foundation for Advanced Study on International Development.

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Workshop 4

Facilitating a theory of change as a comprehensive learning framework for participatory impact planning, evaluation and learning (IPEL) in complex change processes

When: Sunday, March 29 from 9:00 to 13:00

Where: Room 4

Number of participants: 30 people.

Level: This workshop is open to impact planning, evaluation and learning practitioners and consultants; donors. This workshop is the first in a two part series and participants should also attend the "Learning with constituents" workshop to follow in the afternoon.

Language: English with simultaneous interpretation in French and Arabic

Conducted by: Andre Proctor, Munyaradzi Saruchera and Natalia Kiryttopoulou from Keystone

Course objectives: This hands-on workshop organised by Keystone is the first in a two part series workshops on impact planning and learning method. It will equip participants with the conceptual knowledge and skills to elaborate their theory of change so that it works as a comprehensive framework for planning, learning and reporting on their impacts (deliberate and unintended) and their contribution to long term sustainable success in complex systems.

Methodology: The workshop will use case analysis, role plays, mini-assignments and other interactive learning activities. Guidelines and tools will be provided and modified during the workshop by participants for their own possible future use.

Content: The first part of the course will cover the following topics: (i) How to think in terms of outcomes and results rather than outputs and activities; (ii) Understand success within a *system*; (iii) Understand the pre-conditions of success; (iv) Map short term and intermediate 'ecosystem-intelligent' pathways; (v) Review existing strategies in the light of the emerging theory of change; (vi) Bring the perspectives of beneficiaries, funders and other stakeholders meaningfully into their planning, learning and reporting.

Facilitators bios

Andre Proctor is a Keystone founder and now serves as its Programme Services Director and manages the Cape Town office. He leads on the development of Keystone's ground-breaking Developmental Impact Planning and Learning methodology, and accompanying tool suite. He also co-leads in the development of Keystone's Comparative Constituency Feedback Survey methodology. He has worked for more than twenty-five years in education and training and in developmental practice. His work has included research, curriculum development, writing educational materials and textbooks, publishing, and the design of web-based educational programs. For the last twelve years he has specialized as facilitator of organization development processes for CSOs in Africa, including program evaluations where he has pioneered new approaches to developmental impact evaluation. He initiated and leads a project to develop a competency-based qualification framework in the field of Development Management and Practice in association with the Sustainability Institute at the University of Stellenbosch.

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Munyaradzi Saruchera has been working with Keystone in South Africa since November 2008 as an Advisor and Research Associate. He has more than 10 years' research working experience in the community-based natural resource management and smallholder farmer support sectors. He has worked for a range of national, regional and international organisations in Botswana, South Africa and Zimbabwe. These include IUCN –the World Conservation Union's Regional Office for Southern Africa, the Southern Africa Research and Documentation Centre's Environment Unit, IUCN's Ecosystems' Commission, the University of the Western Cape, Biowatch South Africa and the Sustainability Institute. Munya's work interest is in the quality of relationships and the learning systems between development agents and beneficiaries in social change and sustainable community development processes.

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Natalia Kiryttopoulou joined the Keystone team in November 2006 as an Advisor and Research Associate. Natalia's current work involves strategic research on performance measurement and reporting of developmental processes and the use of participatory methods for enhancing the accountability of citizen organizations to their constituents. As a Keystone advisor, she provides services to citizen organizations and philanthropic institutions for designing impact planning and learning systems, as well as comparative constituency feedback surveys. She also carries out the main project management tasks for Keystone's engagements.

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Workshop 5

Real World Evaluation: Practical tips for doing evaluations as well as possible in spite of budget, time, data and political constraints

When: Sunday, March 29 from 9:00 to 18:00

Where: Room 5

Number of participants: 40 people

Level: Intermediate. Preferably participants in this workshop will have taken academic courses in evaluation methods and/or have experience in conducting evaluations.

Language: English with simultaneous interpretation in French and Arabic

Conducted by Jim Rugh, independent consultant (USA)

Course objectives: This workshop will give an introduction to various impact evaluation design options that are adapted for particular evaluation settings. It will provide a perspective on logic models that can take into account multiple contributions to the achievement of outcomes and impacts, and provide the seven steps of the RealWorld Evaluation approach for addressing common issues and constraints faced by evaluators.

Methodology: The RWE workshop will focus on addressing constraints commonly faced during project impact evaluations, making reference to a variety of tools methodologies. The focus will be on applying techniques during small-group work on case studies. It will be assumed that participants will already be familiar with most if not all of those common evaluative techniques.

Content

1. Rapid overview of RealWorld Evaluation (RWE), including evaluation designs.
2. Examples of RWE techniques for addressing constraints such as: when the evaluator is not called in until the project is nearly completed and there was no baseline nor comparison group; where the evaluation must be conducted with inadequate budget and insufficient time; and where there are political pressures and expectations for how the evaluation should be conducted and what the conclusions should say.
3. Group exercise: preparing an evaluation design when working under budget, time, data or political constraints.

Facilitator bio

Jim Rugh has been professionally involved in promoting international development for 45 years; the past 29 of which he has been focused on international program evaluation. He is very involved in promoting the evaluation profession internationally, including serving as the American Evaluation Association (AEA) representative to the International Organization for Cooperation in Evaluation (IOCE). Jim recently retired after 12 years as the director of evaluation for CARE International. He now serves as an independent consultant, often conducting workshops on RealWorld Evaluation, based on the book by that title he co-authored with Michael Bamberger and Linda Mabry.

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Workshop 6

Monitoring? Evaluation? Impact Evaluation? Appreciating and Taking Advantages of the Differences

When: Sunday, March 29 from 9:00 to 18:00

Where: Room 6

Number of participants: 40 people

Level: All levels

Language: English with simultaneous interpretation in French and Arabic

Conducted by: Burt Perrin, Independent Consultant (Canada)

Course objectives: This workshop will provide guidance about how to use monitoring, evaluation, and impact assessment in a complementary fashion. For example, it is usually inappropriate to use monitoring information to make decisions in the absence of information from evaluation that explains *why* given results have occurred or not.

Content

There is widespread lack of appreciation of the respective differences among monitoring, evaluation, and impact assessment/evaluation, including understanding the strengths and limitations of each approach. The concept of impact evaluation is also poorly understood – as well as how it can complement other forms of evaluation and monitoring activities.

In essence, monitoring involves tracking progress against pre-determined targets, without questioning the appropriateness of programme objectives, activities, or indicators that are used. In contrast, evaluation can examine all of these and related considerations, including the programme rationale. Evaluation can identify unintended effects that often can be more significant than what was originally planned. It can provide explanation of why given results have or have not happened, and can provide guidance for future directions. Impact evaluation involves looking at attribution in some way, and the OECD/DAC definition that arguably is most commonly known among development practitioners defines impact as the 'positive and negative, primary and secondary long-term effects produced by a development intervention, directly or indirectly, intended or unintended'. Impact evaluation is needed to understand when development is truly successful. Yet it is not always possible or meaningful to conduct impact evaluations.

Facilitator bio

Burt Perrin is an independent consultant based in France, has a rare combination of top quality skills in research and evaluation, and extensive experience with a wide variety of government, non-profit and private organisations, trusts and international agencies. He has over 30 years' practical experience in policy development, evaluation and strategic planning – 13 years working as an internal evaluator and policy advisor within government, and as head of his own consultancy since 1985. Recent assignments have been with public and private organisations in various European countries as well as the European Union, Niger, Kenya, North America, New Zealand, Malaysia, Australia, and with international organisations such as the International Labour Organisation, OECD, the World Food Programme, and the World Bank.

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Workshop 7

Learning with constituents: building reflection and dialogue into the rhythms of the organization, constituency feedback and theory of public reporting

When: Sunday, March 29 from 14:00 to 18:00

Where: Room 4

Number of participants: 30 people

Level: This workshop is open to impact planning, evaluation and learning practitioners and consultants; donors. This workshop is second in a two part series and Participants should have attended the "Developing a theory of change" workshop in the morning.

Language: English with simultaneous interpretation in French and Arabic

Conducted by: Andre Proctor, Munyaradzi Saruchera and Natalia Kirytopoulou from Keystone

Course objectives: This hands-on workshop organised by Keystone is the second in a two part series workshops on impact planning and learning method. Participants will learn about the importance of building learning and reflection with constituents within the rhythms of an organisation or programme. They will also have a practical introduction of currently available tools and methods for engaging in learning activities and dialogue with constituents.

Methodology: The workshop will use case analysis, role plays, mini-assignments and other interactive learning activities. Guidelines and tools will be provided and modified during the workshop by participants for their own possible future use.

Content: The workshop will explore different ways of gathering, learning from and responding to feedback from the people meant to benefit from developmental interventions as a means for: a) understanding progress as measured against an explicit theory of change; b) understanding impacts more generally; c) for managing the quality of relationships across all constituent groups; d) for making improvements; and e) for public reporting. The workshop also moves on to operational issues and systems: building regular times and formats for reflection and learning into the rhythms of an organization, documenting feedback, issues relating to the integrity of feedback data, inclusiveness, rules of evidence and the quality of analysis and argument.

Facilitators bios

Andre Proctor is a Keystone founder and now serves as its Programme Services Director and manages the Cape Town office. He leads on the development of Keystone's ground-breaking Developmental Impact Planning and Learning methodology, and accompanying tool suite. He also co-leads in the development of Keystone's Comparative Constituency Feedback Survey methodology. He has worked for more than twenty-five years in education and training and in developmental practice. His work has included research, curriculum development, writing educational materials and textbooks, publishing, and the design of web-based educational programs. For the last twelve years he has specialized as facilitator of organization development processes for CSOs in Africa, including program evaluations where he has pioneered new approaches to developmental impact evaluation. He initiated and leads a project to develop a competency-based qualification framework in the field of Development Management and Practice in association with the Sustainability Institute at the University of Stellenbosch.

Email: andre@keystoneaccountability.org

Munyaradzi Saruchera has been working with Keystone in South Africa since November 2008 as an Advisor and Research Associate. He has more than 10 years' research working experience in the community-based natural resource management and smallholder farmer support sectors. He has worked for a range of national, regional and international organisations in Botswana, South Africa and Zimbabwe. These include IUCN –the World Conservation Union's Regional Office for Southern Africa, the Southern Africa Research and Documentation Centre's Environment Unit, IUCN's Ecosystems' Commission, the University of the Western Cape, Biowatch South Africa and the Sustainability Institute. Munya's work interest is in the quality of relationships and the learning systems between development agents and beneficiaries in social change and sustainable community development processes.

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Natalia Kiryttopoulou joined the Keystone team in November 2006 as an Advisor and Research Associate. Natalia's current work involves strategic research on performance measurement and reporting of developmental processes and the use of participatory methods for enhancing the accountability of citizen organizations to their constituents. As a Keystone advisor, she provides services to citizen organizations and philanthropic institutions for designing impact planning and learning systems, as well as comparative constituency feedback surveys. She also carries out the main project management tasks for Keystone's engagements.

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Workshop 8

Ten Steps To A Results Monitoring and Evaluation System To Achieve Development Impact

When: Monday, March 30 from 9:00 to 13:00

Where: Room 1

Number of participants: 50-60 people

Level: Beginners or new to M&E for government decision making

Language: English with simultaneous interpretation in French and Arabic

Conducted by Jody Kusek, World Bank

Course objectives: Monitoring and evaluation helps answer the "So what" questions: 'So what that a government invested in 50 new hospitals?' 'So what that 2000 km of roads were built in the country and so what that 100 teachers were hired?' How do these actions result in achievement of a country's key national or ministerial goals? Credible answers to 'So what' questions address the accountability concerns of stakeholders, give government managers information on progress towards achieving stated targets and goals, and provide substantial evidence on what is working and what is not.

Content: Monitoring systems and evaluation systems are two sides of the same coin. Both are needed to provide information to decision makers about whether policies and programs are being implemented to achieve the organization's goals. Monitoring systems can answer questions such as "what is the current performance against planned performance" and Evaluation systems can answer "why is the performance of this program less than expected or better than expected". In other word, Monitoring systems tell us where we are today and evaluation systems tell us why we are there. Both are important to determine the effect of an intervention on the organization and the subsequent impact of that intervention.

Facilitator bio

Jody Zall Kusek has provided leadership in the area of results based management at the World Bank for nine years. She is a leader in the World Bank on Monitoring and Evaluation and has co-developed the Results Based Country Assistant Strategy methodology . This new model for business planning has been successful in focusing the World Bank's investments towards the use of monitoring and evaluation systems to support continuous assessment that results are being achieved. She was the Cluster Leader for Getting Results at the World Bank's Africa Region, Earlier, Ms. Kusek worked for the Clinton-Gore Administration in the United States, designing and implementing the Government Performance and Results Act that is the hallmark of the US's strategic and program planning model. She is the co-author of Ten Steps to Results Based Monitoring and Evaluation, now in its 4th printing and available in five languages. This handbook is used by academic institution, national governments, and developing partner's world wide to better understand the principles and practices of results based M&E. She is also the author of numerous papers on government management; results based management and poverty monitoring system development.

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Workshop 9

An Introduction to the History, Logic, and Processes of Systematic Reviewing and Meta-Analysis

When: Monday, March 30 from 9:00 to 18:00 (participants may attend just the morning as an introductory session)

Where: Room 3

Number of participants: No limit

Level: Intermediate

Language: English with simultaneous interpretation in French and Arabic

Conducted by Jeff Valentine on behalf of Campbell Collaboration

Course objectives: This session will first attempt to answer the questions "What is a systematic review?" and "Why are systematic review methods necessary?" Secondly, the session will provide additional context about the development of scientific review methods from an historical perspective and suggest that a good literature search is the foundation of a good systematic review, and will illustrate some dangers of "cherry picking" evidence to make a particular point.

Methodology: Due to the content, the workshop will be mostly lecture, but there will be some hands-on activities.

Content

1. Logic of systematic reviewing: "What is a systematic review?" and "Why are systematic review methods necessary?"
2. History of systematic reviewing and meta-analysis
3. Searching the literature
4. Coding studies: participants will be introduced to the ways that data are extracted from studies. An exercise will be used to illustrate both coding and how reliability is checked.
5. Effect sizes: This is a technical session that introduces the notion of an effect size, illustrates why they are necessary, and demonstrates how they are computed from a variety of data.
6. Basic meta-analysis: participants will be introduced to meta-analysis, and will be shown how to compute a weighted average effect size and a confidence interval.

Facilitator bio

Jeff Valentine is an Assistant Professor at the University of Louisville, USA. Previously, he was teaching and conducting research at the Department of Psychology of Duke University (2003-2006), and the University of Missouri (2001-2002).

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Workshop 10 Challenges in Agricultural Development for Impact Evaluation

When: Monday, March 30 from 9:00 to 18:00

Where: Room 4

Number of participants: No limit

Level: Intermediate

Language: English with simultaneous interpretation in French and Arabic

Conducted by Lawrence Haddad, Peter Taylor and Edoardo Masset from IDS, and Alex Jacobs from Keystone Accountability

Course objectives: This workshop will explore the critical challenges for improving impact planning, evaluation and learning, and provide practitioners an opportunity to engage with the new institutional arrangements, methods, and tools being developed by the proposed Gates-funded Agriculture Learning and Impacts Network (ALINE) to response to these challenges.

Methodology: A short presentation from ALINE members on each theme with the initial problem analysis and approach will be followed by interactive exercises designed to explore new methods and tools. Role plays, simulations and case reviews will all be used to refine problem analysis and to facilitate common understandings and innovative thinking about preliminary solutions.

Content: Themes to be explored in the workshop include: (i) how practically do organisations find the right balance between measuring performance and measuring longer term results; (ii) designing and delivering constituency feedback tools and services; (iii) fostering a system-level approach to planning and learning; and (iv) testing approaches to some of the enduring challenges in IPL for agriculture development.

Facilitators bios

Peter Taylor is a Research Fellow and is also Team Leader of the Participation, Power and Social Change Team at IDS. His background is in agriculture and education and he is a qualified teacher. He has worked for many years on issues relating to education for agricultural and rural development, and participatory approaches and processes in educational arenas. Peter has been involved in a wide range of research and advisory activities, including: participatory curriculum development in agricultural and forestry education; research into use of contextualised curricula and teaching methodologies in basic education; support to initiatives supporting development of education provision for people in rural areas; training of trainers and teachers on participatory approaches and methodologies; engaging in collaborative inquiry into education for community change; research on grassroots democracy and empowerment; and facilitation of distance learning events and seminars. Peter currently convenes international initiatives on 'Learning and teaching for transformation' and 'Facilitating learning for social change'.

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Lawrence Haddad's main research interests have been at the intersection of poverty, food insecurity and malnutrition - including poverty dynamics, social capital, HIV/AIDS, social protection, agriculture and poverty, and women's empowerment. Currently Director of the Institute of Development Studies and a Professor of Development Studies at the University of Sussex, he was formerly Director of the International Food Policy Research Institute's Division of Food Consumption and Nutrition. He was a Commissioner on the MacArthur Commission on

Higher Education for Development Professionals, a member of Irish Aid's Hunger Task Force and is President of the UK's Development Studies Association.

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Edoardo Masset is a research fellow of the Vulnerability and Poverty team at IDS. He is an agricultural and development economist, and his main research interests include the analysis of poverty and inequality, food consumption, risk and uncertainty, and the quantitative analysis of household surveys. He has considerable knowledge of micro-econometrics and applied statistics, and extensive experience of designing and conducting impact evaluations of development interventions. He worked for over six years for the evaluation department of the World Bank being involved in the impact evaluation of World Bank projects in the following areas: education, nutrition, irrigation, watershed development, rural electrification and microcredit.

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Alex Jacobs is Director of Research at Keystone Accountability. From 1999 – 2008, Alex was the founding Director of Mango, a UK-based charity that helps NGOs strengthen their financial management and accountability. During this time Alex worked with many different NGOs, for instance conducting cutting edge research with Concern and carrying out major evaluations for ActionAid and DEC. He previously worked in sub Saharan Africa with Oxfam GB and other NGOs, having started his career with PricewaterhouseCoopers. Alex has a degree in Social Anthropology and is a qualified Chartered Management Accountant. Alex sits on BOND's board of trustees and is a member of Oxfam GB's Association. Alex joined Keystone at the start of 2009 and takes the lead responsibility for Keystone program development and the delivery of the ALINe project. Additional roles involve methodology and services development, including constituency voice, and the development of Keystone as a leader in its field.

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Cairo 2009 Planner

Pre-conference workshops, March 29-31

Workshop 11

Impact Evaluation for Development Effectiveness

When: Monday, March 30 from 9:00 to 18:00

Where: Room 5

Number of participants: 70

Level: Some previous experience in evaluation

Language: English with simultaneous interpretation in French and Arabic

Conducted by Sanjeev Khagram from The Harvard Business School and Innovations for Scaling Impact (iScale), Andre Proctor from Keystone, Zenda Ofir from Evalnet and Patricia Rogers from CIRCLE at the Royal Melbourne Institute of Technology

Workshop objectives: This one-day training workshop will bring together leading experts and developing country practitioners to discuss how to apply rigorous mixed method approaches, in particular comparative case study, systems approaches, and constituency voice to improve the conduct and use of impact evaluation for development effectiveness. Workshop participants will be introduced to a range of rigorous and credible methods with the goal of making such methods better understood and more readily available.

Methodology: This workshop will include a mix of expert presentations, facilitated discussion and experiential learning. Participants will share and develop better understandings of:

- Development and development effectiveness in the 21st Century
- Processes for impacts planning, assessment and learning
- Causality, causes, causal effects and causal mechanisms
- Specific mixed method frameworks, tools and approaches including comparative case study, systems approaches, and constituency voice
- Examples of good and bad applications

Content: Our understanding of what development effectiveness is, how to achieve it, and how to analyze it, has changed dramatically. Much development work looks very different now in four fundamental ways – what the goals are, who is involved, how stable and standardized the interventions are, and the contextual conditions that shape it. At the same time there have been tremendous advances in the theory and practice of evaluation – including the increasing focus on causal mechanisms over average causal effects, the use of a rigorous mixed method approach, incorporation of systems concepts and methods into evaluation, increased attention to the use of impact evaluation findings and processes, and a greater focus on learning.

Rigorous mixed method approaches, which draw on both qualitative and quantitative data, can be powerful strategies not only to analyze causal effects (the results of a specific intervention) but even more *importantly*, causal mechanisms (the structures and processes that drive change), and not only to improve internal validity (the conclusions that can be drawn from a single study) but also external validity (the ability to generalize these results to other settings). The dramatic advances and innovations in using mixed method designs made in the social sciences over the last 15 years must be incorporated into impact evaluation practice.

Simply producing more accurate or better information on development effects is not enough for impact evaluation to make significant contributions to improving results and decision-making – especially investment decisions. Accordingly, the workshop will focus on both undertaking and using impact evaluation. It will examine how these methods can be used to undertake impact evaluations and synthesize evidence from multiple evaluations. It will also

examine how these methods can support improved action, accountability, empowerment, learning and improvement towards longer-term development effectiveness.

Facilitators bios

Sanjeev Khagram is known worldwide for his interdisciplinary and cross-sectoral leadership, research, teaching and engagement in the areas of globalization and transnationalism, sustainable development, human security, good governance, public policy, partnerships, social networks, corporate social responsibility, civil society, strategic management, impact assessment. He is currently Wyss Scholar at the Harvard Business School, Ratan Tata Chair at the Tata Institute of Social Sciences, and Lead Steward of iScale. He was previously Director of the University of Washington's Lindenberg Center for International Development, Dean of the Desmond Tutu Peace Centre, a faculty member at Harvard's JFK School of Government, and led the global impact evaluation and learning program at the World Commission On Dams. Khagram has worked extensively with global action networks, multilateral agencies, governments, corporations, civil society organizations, professional associations and universities all over the world, with extended periods in Brazil, India, Mexico, Nigeria, South Africa, Thailand, Germany and the United Kingdom. He holds a B.A. in development studies/engineering, an M.A. in economics, and a Ph.D. in political science, all from Stanford University.

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Zenda Ofir, a South African national with a PhD in Chemistry, has been a full-time evaluation specialist since 2000. She has led or conducted different types of evaluations and institutional assessments in more than 30 countries, primarily in Africa and Asia. She evaluates at national, regional and global levels in diverse fields, among others in rural development, environment, energy, conservation, agriculture, child labor, HIV/AIDS, research development, knowledge management and capacity building. Her clients have included universities, NGOs, government agencies, and bi- and multilateral organizations such as JICA, SIDA, IUCN (Switzerland), UNDP and UNIFEM (New York), IDRC (Ottawa), ILO (Geneva), UNEP (Nairobi) and IFAD and CGIAR (Rome). She has served on several international expert panels in evaluation, including for IFAD and WFP. She was President of the African Evaluation Association (AfrEA), Vice-President of IOCE, first Board member of the American Evaluation Association (AEA) based outside the USA, CGIAR Standing Panel member on Impact Assessment and NONIE Steering Committee member. In 2007 she spent six months as visiting professor at the University of Hiroshima in Japan. Zenda's early career included appointments as national science council grants manager and as Director of Research at the University of Pretoria in South Africa.

Email: zenda@evalnet.co.za

Andre Proctor is an African historian by training. Andre has worked for the last thirty years in education and development practice. His work has included research, curriculum development, writing children's books, and a wide range of educational materials. For the last twelve years he has specialized as facilitator of organization development processes for CSOs in Africa, including program evaluations where he has pioneered new approaches to developmental impact evaluation. A founding partner of Keystone in 2004, Andre now serves as its Programme Director and manages the Cape Town office. He leads on the development of Keystone's ground-breaking Developmental Impact Planning and Learning (DIPAL) methodology, and accompanying tool suite. Andre also leads in the development of Keystone's Comparative Constituency Feedback Survey methodology. This is a practical and powerful way of bringing the voices of those affected by development interventions into learning and decision-making.

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Patricia Rogers –Professor of Public Sector Evaluation at the Royal Melbourne Institute of Technology, she leads an interdisciplinary research program on evidence-based policy and practice in health and well-being. Her work has focused particularly on methods for generating evidence about complicated and complex interventions where the evaluation question needs to be “What works for whom in what circumstances” and supporting evidence uptake and translation. Her publications have included entries on accountability, program logic and logic models for the Encyclopedia of Evaluation, and a chapter on using evaluation for improvement and organisational learning for the Sage Handbook of Evaluation. Most recently she has written on the use of program logic for complex and complicated interventions, and the use of qualitative cost benefit analysis for complex, emergent programs. She has worked for more than 20 years in public sector evaluation, across a wide range of programs (including development, early childhood, education, Indigenous housing, criminal justice, and agriculture), levels of government (national, state and local) and multilateral organizations, including projects with NONIE, UNDP, World Bank Institute, Development Bank of Southern Africa, Consultative Group on International Agricultural Research and the Foundation for Advanced Study on International Development.

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Pre-conference workshops, March 29-31

Workshop 12

Mixed methods in impact evaluation

When: Tuesday, March 30 from 11:00 to 13:00

Where: Room 6

Number of participants: 30-40 people

Level: Level: Participants should have familiarity with multiple evaluation traditions and multiple social science inquiry methodologies

Language: English with simultaneous interpretation in French and Arabic

Conducted by Jennifer Greene from the University of Illinois

Course objectives: This brief workshop will (a) introduce participants to the theory and logic of mixed methods approaches to evaluation and social research and (b) critically analyze the important applications of mixed methods concepts to impact evaluation of international development programs and projects.

Methodology: The workshop will use a combination of lecture, discussion, and an application activity, wherein participants will use mixed methods ideas in an impact development evaluation context.

Content

The key themes to be addressed include:

- Just what is being mixed in mixed methods inquiry, or the contributions and limitations of mixing at the levels of framework/paradigm, methodology, and method;
- Different purposes for mixing methods;
- Variations in mixed methods design;
- Challenges of methodological quality and warrant for inferences in mixed methods studies.

Facilitator bio

Jennifer C. Greene is a professor of Educational Psychology at the University of Illinois, Urbana-Champaign. She has been an evaluation scholar-practitioner for over 30 years. Her work focuses on the intersection of social science methodology and social policy and aspires to be both methodologically innovative and socially responsible. Her work in mixed methods well engages this commitment. Greene's conceptual methodological work has concentrated on advancing the qualitative and mixed methods approaches to social inquiry, as well as participatory-democratic commitments in evaluation practice. Greene has held leadership positions in the American Evaluation Association and the American Educational Research Association. She has also provided considerable editorial service to both communities, including a six-year position as co-editor-in-chief of *New Directions for Evaluation*. Her own publication record is extensive and includes a co-editorship of the recent *Sage Handbook of Program Evaluation* and authorship of *Mixed Methods in Social Inquiry*.

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Pre-conference workshops, March 29-30

Workshop 13

Most significant change technique

When: Monday, March 30 from 14:00 to 18:00

Where: Room 1

Number of participants: No limit

Level: beginners to intermediate

Language: English with simultaneous interpretation in French and Arabic

Conducted by Jess Dart from Clear Horizon

Course objectives: Participants will be introduced to the Most Significant Change Technique and will take part in a story selection process. The workshop will provide a brief overview of the theory behind MSC and how it has been modified to be used in impact evaluations.

Content

In our increasingly globalised and changing world, it becomes critical for evaluation frameworks to positively engage with unpredicted or unanticipated impacts and diversity. Managing programs in this context requires a greater need for reflection and course correction than programs in more predictable settings. Involving regular collection and interpretation of stories about change, the Most Significant Change Technique (MSC) is a powerful tool for formative evaluation and is particularly good at exploring the more intangible and unanticipated outcomes. MSC goes beyond merely capturing and documenting stories; each story is accompanied by the storyteller's interpretation, and after review the stories are also accompanied by the reviewers' interpretation. One of the ideas behind the technique is that it promotes a slow but extensive dialog up and down the organisational hierarchy.

In addition to being a valuable tool for formative evaluation, MSC has also been used as a component of large-scale impact evaluations. MSC has been fruitfully combined with intervention logic, expert panels and the evaluation summit technique to yield a powerful, yet participatory impact evaluation process, which is especially good at determining the extent to which programs have contributed to high level outcomes.

Facilitator bio

Jess Dart received the 2006 Australasian 'Evaluation Development Award'. She is a recognized leader in evaluation with over 15 years of involvement in evaluating social change programs in Australia and overseas. Jessica specialises in the evaluation of projects with complex, intangible outcomes. As part of her PhD she jointly developed the 'Most Significant Change technique' alongside Rick Davies. Her main interests are in qualitative and participatory monitoring and evaluation approaches. In October 2005 Jessica established 'Clear Horizon Consulting' which has grown to comprise 13 staff and specialises in monitoring and evaluation.

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Pre-conference workshops, March 29-31

Workshop 14

Quasi-experimental approaches to attribution analysis

When: Monday, March 30 from 14:00 to 18:00

Where: Room 2

Number of participants: 100 people

Level: Intermediate

Language: English with simultaneous interpretation in French and Arabic

Conducted by Sebastian Martinez (World Bank)

Course objectives: This workshop is a comprehensive overview of quasi-experimental impact evaluation methods and practice. Starting with providing an understanding of the attribution problem and selection bias participants will discuss a core set of quasi-experimental evaluation tools that can be applied to identify the causal impact of an intervention.

Methodology: Mix between lecturing using theory and case studies of applied impact evaluations conducted in developing countries.

Content: The session discusses the intuition behind causal inference, and offers participants an opportunity to apply this intuition through examples and case studies. The workshop will help participants understand the causality problem and how to address it; know how to differentiate and use alternative identification strategies for measuring impact (difference-in-difference estimates, discontinuity design, instrumental variables, matching techniques); and understand the basics of sample design and power calculations for primary data collection.

Facilitator bio

Sebastian Martinez is an Economist in the World Bank's Human Development Network. He holds a Ph.D. in Economics from the University of California at Berkeley, with a specialization in development economics and applied micro-econometrics. His work focuses on the evaluation of social programs and policies in the developing world, spanning the areas of health, labor, education, social protection and housing. Sebastian has led the design and implementation of over a dozen large scale impact evaluations and has provided technical advice to over one hundred projects worldwide.

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Pre-conference workshops, March 29-31

Workshop 15

Designing a contribution analysis for assessing expected impacts

When: Sunday, March 29 from 14:00 to 18:00

Where: Room 6

Number of participants: 25 people

Level: Intermediate

Language: French with simultaneous interpretation in English and Arabic

Conducted by Prof. Eric Monnier from Geneva University and Laurent Raffier,

Course objectives: The workshop will devote half of the time available to a case study: a full contribution analysis in the context of the evaluation of European support to Jordanian SMEs. The participants will have the opportunity to practice the 5 main steps of contribution analysis from expected changes to checking the assumptions: (i) to gather data about the expected changes (e.g. policy reforms launched and implemented according to plans); (ii) to develop the cause-and-effect assumptions between changes and EC activities covered (e.g. technical assistance, capacity building, dialogue and coordination); (iii) to gather evidence confirming the assumptions, i.e. facts and statements supporting the idea that positive changes are due to the EC activities; (iv) to gather evidence disconfirming the assumptions, i.e. facts and statements supporting the idea that positive changes are not due to EC activities but to other factors (e.g. proactive role of a Jordanian actor, role of another donor, etc.), or that the EC activities generated negative changes; and (v) to assess the extent to which the assumptions are confirmed (qualitatively).

Content: Contribution analysis addresses the challenge of analysing causes and effects using an alternative design to the so called "attribution analysis" (applying randomized control trials or econometric modelling). Participants will learn why it is recommendable to choose contribution analysis instead of attribution analysis when an evaluation takes place in a context where:

- the implementation is uneven;
- the targeted public is heterogeneous;
- the intended behavioural change is not easily measurable
- the contextual factors have a major influence
- or when, the cause-and-effect assumptions are complex.

For more information:

http://ec.europa.eu/comm/europeaid/evaluation/methodology/methods/mth_att_en.htm

Facilitators bios

Eric Monnier Managing Director of the Centre for European Evaluation Expertise, Euréval (France) and Lecturer at Geneva University. He advises public authorities at the local, national and European level for designing and steering evaluation projects. He leads large international evaluations in various domains such as regional development, social and environmental policies. Monnier is one of the founding members of the European Evaluation Society, as well as of the French Evaluation Society. Author of numerous articles and books in French and English, he sits on the Editorial Committee of the journal "Evaluation" (Sage, London). He has a PhD in urban sociology as well as a civil engineering degree.

Email: monnier@eureval.fr

Laurent Raffier is consultant. He joined Euréval in 2006 as a political analyst. He is in charge with carrying out evaluations for national, regional and European level administrative bodies. His specialisation issues are international cooperation and public health policies. He notably participates recently to the Evaluation of the European commission support to the Hashemite Kingdom of Jordan. He takes part mainly in data collection and analysis, both quantitative and qualitative, and in particular interviews, case studies and online surveys. He also contributes to report redaction and presentation.

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Pre-conference workshops, March 29-31

Workshop 16

NONIE Workshop: More and Better Impact Evaluation For Learning What Works in Raising Agricultural Productivity – Problem solving session to address knowledge gaps

When: Tuesday, March 31 from 9:00 to 12:30

Where: Room 1

Number of participants: 60 people

Level: targeted for people working in the area of agriculture

Language: English with simultaneous interpretation in French and Arabic

Organized by NONIE Network of Networks on Impact Evaluation

Speakers: Ximena Del Carpio (World Bank), Paul Gertler (UC Berkeley) and Máximo Torero (IFPRI)

Course objectives: It is essential to know what works in various areas of development. Impact evaluation is very well placed to help build a body of evidence in development themes and sectors in order to advance outcomes and results. NONIE, through its mission 'doing more and better impact evaluations' strives at helping to fill the existing knowledge gaps by focusing its work on a particular set of themes each year. The first thematic focus for NONIE's work will be "What Works in Improving Agriculture Productivity?"

Content

The proposed session kicks off the agriculture thematic focus of NONIE's work with a panel that mixes evaluation expert skills with examples from real impact evaluations and participants' experiences for advancing the knowledge of what works in development. The session is composed of four highly integrated parts that build onto each other. First, evaluation gaps and important challenges in the area of development interventions for improving the productivity of agriculture will be laid out. Secondly, approaches of how to do IEs for addressing these gaps and challenges are discussed by a well-known impact evaluation expert. Thirdly, and by using an existing evaluation, the discussion will expose some real constraints faced by evaluators and options how to address these. Finally the floor will be open for the participants to submit questions to the panel regarding challenges they face in design and implementation of their own impact evaluations.

Facilitator bios:

Ximena Del Carpio is an economist in the Independent Evaluation Group, Corporate Global and Methods team. Ximena works on issues related to poverty measurement and impact evaluations of social programs and is currently leading a study measuring what works to improve Agricultural productivity. She has been at the World Bank for over four years, and her thematic areas of focus are primarily Social protection and Rural development. Ximena has a PhD in Political Economics from the Economics department at the University of Southern California and holds a Master degree in economics, and a joint Master in public policy and business administration. Prior to the World Bank she conducted research at the RAND Corporation and worked at the Minority Development center (U.S. Department of Commerce).

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Paul J. Gertler is the Li Ka Shing Distinguished Professor of Economics and Director of the

Graduate Program in Health Management in the Haas School of Business at the University of California, Berkeley. After earning a PhD in Economics from the University of Wisconsin, Madison in 1985, Dr. Gertler joined the Department of Health Policy and Management at Harvard University. He left the position in 1989 for the RAND Corporation as a Senior Economist. In 1994, he returned to Harvard University as a visiting professor in the Department of Economics, and was appointed to the faculty at University of California, Berkeley in 1996.

In August 2004, Dr. Gertler joined the World Bank as Chief Economist of the Human Development Network. In this position, Dr. Gertler led the Human Development Network's research agenda with a goal of developing evidence-based policy advice with particular attention to impact evaluation. His work directly contributed to the Bank's agenda to improve key development outcomes in the areas of education, health, HIV/AIDS, social protection, children and youth.

In addition to these achievements, Dr. Gertler has gained extensive experience in consulting and policy-making with international agencies such as the Asian Development Bank, Inter-American Development Bank, United Nations Development Programme, UNAIDS, World Health Organization and the World Bank. In addition, Dr. Gertler has collaborated with governments on policy related agendas throughout Latin America and Asia, as well as with private sector corporations. Dr. Gertler has received multiple awards, including the Kenneth Arrow Award in Health Economics (1996); Academic Career Leadership Award, United States National Institutes on Health (1998); and a Global Development Network Award (2002). He has also published more than 75 journal articles and books on a wide variety of subjects.

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Máximo Torero is Division Director, Markets, Trade, and Institutions, and senior research Fellow at IFPRI. He is also leader of the Global Research Program on Institutions and Infrastructure for Market Development. Prior to that, he was a senior researcher and member of the executive committee at Group of Analysis for Development (GRADE). He received his Ph.D. from the University of California at Los Angeles Department of Economics, is a professor on leave at the Universidad del Pacífico, and was postdoctoral fellow at the UCLA Institute for Social Science Research (ISSR). Dr. Torero's major research work lies mostly in analyzing poverty, inequality, importance of geography and assets (private or public) in explaining poverty, and in policies oriented towards poverty alleviation based on the role played by infrastructure, institutions, and on how technological breakthroughs (or discontinuities) can improve the welfare of households. He has won twice the World Award for Outstanding Research on Development given by the Global Development Network (GDN).

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Pre-conference workshops, March 29-31

Workshop 17

Designing and Implementing Household Surveys

When: Tuesday, March 31 from 9:00 to 12:30

Where: Room 2

Number of participants: 30 people

Level: Intermediate

Language: English with simultaneous interpretation in French and Arabic

Conducted by Kathleen Beegle and Kinnon Scott, World Bank

Course objectives: The course will provide participants with an overview of the key phases and aspects of the design and implementation of multi-topic household surveys. It will draw heavily on over twenty years of experience of the Living Standards Measurement Study (LSMS) surveys in the World Bank. Participants will receive a firm grounding in the basics of household survey design and implementation, as well as innovations and emerging issues at the frontier of household surveys for informing development effectiveness.

Content

SESSION 1 (1.5 hour): Assessing data needs, Questionnaire design and basic principle of sample design

The first part of this session will address the process of identification of information needs and the kinds of instruments that can be used to gather needed data, focusing on the requirements for impact evaluation purposes.

SESSION 2 (1 hour): Fieldwork logistics and data quality control procedures

The presentation will describe the key elements of doing field work: How do you organize your teams? What task does each person do? How do you recruit and train the teams? How do you supervise them? The emphasis will be on how to maintain very high levels of quality control and the logistical, managerial and strategic issues implications.

SESSION 3 (1 hour): Innovative uses of LSMS data

The presenter(s) will review examples of evaluation work done using LSMS and other household survey data and highlight the impact of the findings in policy dialogue.

Facilitators bios

Kathleen Beegle is a senior economist in the World Bank's Research Group. She received her Ph.D. in Economics from Michigan State University in 1997 and worked at RAND Corporation from 1997-2001 before joining the World Bank. Her research interest includes the measurement of poverty dynamics, socio-economic dimensions of HIV/AIDS in sub-Saharan Africa, and methods in household survey data collection. Current empirical studies underway include the examination of coping strategies among households in Tanzania using a 13-year longitudinal survey and a study of the impact of gender income inequality on the spread of HIV/AIDS in Kenya. Other on-going work focuses on the causes and consequences of child labor, and the dependency of households on food aid in Malawi. As member of the World Bank Living Standards Measurement Study team, she has expertise in the design and implementation of household survey operations and use of household surveys for poverty and policy analysis.

Email: kbeegle@worldbank.org

Kinnon Scott is presently a Senior Economist for the Development Economics Research Group, Poverty, at World Bank. Ph.D., M.P.I.A. and M.U.R.P., Development Studies, Graduate School of Public and International Affairs, University of Pittsburgh. Her present research projects focus on the nexus of disability and poverty in developing countries and the impact of public spending on poverty reduction over time. She also manages the World Bank's Living Standard Measurement Study program, an on-going research initiative generating policy-relevant household level data in developing countries.

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Pre-conference workshops, March 29-31

Workshop 18

Mixed Methods and Social Transformation

When: Tuesday, March 31 from 9:00 to 12:30

Where: Room 3

Number of participants: 70

Level: Intermediate

Language: English with simultaneous interpretation in French and Arabic

Conducted by Donna M. Mertens from Gallaudet University and Bagele Chilisa from the University of Botswana

Course objectives: This workshop will address two critical aspects of impact evaluation in Africa: the importance of being able to insure that programs effectively address critical needs in Africa in a way that clearly and accurately measures impact; and framing impact evaluation in the context of the broader goals for social transformation in Africa.

Content

This workshop will explicitly lay out the transformative mixed methods approach through the use of a theoretical framework, provision of methodological guidance, and illustration of this approach by means of multiple case studies taken from Africa and other parts of the world. The transformative framework is rooted in human rights and social justice and places priority on partnership-based indigenous-rooted approaches. Mixed methods provide a strong approach that is unavailable when a single method is used. Rigor will be a core element of the workshop in terms of making sure evaluators “get it right” in the culturally complex communities that characterize the African evaluation landscape.

The workshop will be structured to allow discussion amongst the participants to tailor the concepts to their own evaluation projects in order to facilitate application of the principles of transformative mixed methods.

Facilitators bios

Donna Mertens is a professor of social research and program evaluation at Gallaudet University where she was recognized as the Distinguished Faculty of the Year for 2007. She is the first editor (with Pauline Ginsberg) of the Handbook of Social Research Ethics (Sage, 2009) and author of Transformative Research and Evaluation (Guilford, 2009). She is a past President of AEA and continues active involvement with AEA in diversity and international issues. She provided leadership in the development of the International Organization for Cooperation in Evaluation and the establishment of the AEA Diversity Internship Program in conjunction with Duquesne University. AEA awarded her their highest honor for service to the organization and the field of evaluation for her contributions in international and diversity initiatives. Dr. Mertens conducts and consults on evaluations, as well as leads professional development activities on research and evaluation in many national and international settings. Email: donna.mertens@gallaudet.edu

Bagele Chilisa a professor of educational research at the University of Botswana. She has published widely on methodological issues with an Afro-centric perspective. She published an article in the International Journal of Qualitative Research that challenges the hegemony of Western perspectives bring to Africa. She also published a book titled Research Methodology in Africa in Adult Education that is widely used. Currently she is the Principle Investigator for a major grant from the National Institutes of Health that examines prevention of HIV/AIDS for Botswana youth that is based on Afro-centric methodologies, including poems, myths, songs and dance. Email: bagelechilisa@yahoo.com

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Pre-conference workshops, March 29-31

Workshop 19

Public Expenditure Tracking Surveys

When: Tuesday, March 31 from 9:00 to 12:00

Where: Room 4

Number of participants: 25-50 people

Level: Evaluators interested in tools to evaluate aid/budget support

Language: English with simultaneous interpretation in French and Arabic

Conducted by Bernard Gauthier from the World Bank

Course objectives: A Public Expenditure Tracking Survey (PETS) is a multi-purpose survey designed to track, on a sample survey basis, the flow of resources through the administrative system in order to determine how much of the originally allocated resources (financial, salaries, in-kind items) reach each level. It is a useful tool for measuring the efficiency and the equity in the use of resources within a sector or program and in particular measuring leakage of resources. Participants will be familiarized with PETS as a tool and the various ways these can be used to assess the effectiveness of service delivery. Objectives of the workshop are to understand when are PETS appropriate, what questions can they answer, what strategic decisions are involved at each stage of design and implementation., what information is needed to design one, how are they organized, what are steps from conceptualization to implementation, analysis and advocacy.

Content: A Public Expenditure Tracking Survey (PETS) is a useful tool for measuring the efficiency and the equity in the use of resources within a sector or program and in particular measuring leakage of resources -- that is the difference between the intended resources and resources actually received at each level particularly service delivery units, such as clinics and schools.

In the last ten years, PETS have been implemented in about three dozen developing countries and have shed light on the process whereby public expenditures translate into service provision at the local level. By identifying resources available at various levels of the supply chain and examining behaviour and incentives of various agents within institutional arrangements, they have identified problems of governance, inefficiencies and capture of funds

Facilitator bio

Bernard Gauthier is professor of economics at the Applied Economics Institute at HEC Montreal (the University of Montreal's Business School) in Canada. His research interests include public sector economics, public finance and the new economics of institutions. Currently on leave from HEC Montreal, he is based at the World Bank in Washington in the PREM-PSM anchor and MENA region. Bernard Gauthier has been involved in micro-level surveys for 16 years including firm-level surveys part of World Bank's Regional Program on Enterprise Development (RPED). Since 2001, he has been involved in public sector micro-level surveys using Public Expenditure Tracking Surveys (PETS) and Quantitative Service Delivery Surveys (QSDS). His experience includes in particular the implementation of a PETS/QSDS in the health sector in Chad and the design of an education PETS in Namibia. In 2006, he has realized a stocktaking review of PETS/QSDS in Africa for the World Bank. He is currently working on the harmonization of PETS/QSDS methodology and the development of micro-level Service Delivery Indicators in education, health and water & sanitation sectors for the World Bank, as well as on a PETS/QSDS in South Africa on early childhood development programs

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Pre-conference workshops, March 29-31

Workshop 20

Designing theory-based impact evaluations

When: Tuesday, March 31 from 9:00 to 12:30

Where: Room 5

Number of participants: No limit

Level: No pre-requisites, though a knowledge of basic evaluation concepts is assumed

Language: English with simultaneous interpretation in French and Arabic

Conducted by Howard White, 3ie

Course objective: This workshop will explore the use of mixed methods to inform theory-based impact evaluation. It will illustrate the use of mixed methods in design, implementation and data interpretation and presentation. Approaches to the analysis of qualitative data will be considered. The examples will illustrate the program theory underlying interventions in the agriculture, nutrition, community-driven development and education sectors.

Content

The workshop will start with a presentation of various impact evaluations (drawing mostly on those undertaken by the presenter during his time at the World Bank's Independent Evaluation Group), stressing the point that a strong factual analysis is required to complement the counterfactual analysis of impact (this workshop will not address strategies for addressing the counterfactual, which is expected to be covered in other workshops). Different sources of data, including monitoring data, will be discussed.

Participants will work in small groups of up to six people. Each group will consider one intervention, developing the evaluation design for that intervention through the series of exercises: (1) study preparation (what literature to look at, who to talk to, what skills mix to have in the team); (2) mapping program theory (what does a program theory look like?, how to write it down); (3) defining and collecting indicators at all levels of the causal chain, including data sources; (4) the mix of methods in examining assumptions and testing the causal chain. Participants will work in small groups of up to six people. Each group will consider one intervention, developing the evaluation design for that intervention through the series of exercises. These exercises will include a brief discussion of the counterfactual impact analysis, so some knowledge of these methods is an advantage.

Facilitator bio

Howard White is the Executive Director of 3ie. He formerly led the impact evaluation program of the Independent Evaluation Group of the World Bank, where he was responsible for impact studies on basic education in Ghana, health and nutrition in Bangladesh, rural electrification, rural development in Andhra Pradesh and a review of impact studies of water supply and sanitation. He has worked on development-related issues for over 20 years, having worked for a range of agencies in countries across Africa and Asia. He has published over 50 papers in internationally referred journals and a number of books.

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Cairo 2009 Planner

Pre-conference workshops, March 29-31

Workshop 21

For whom and why do we conduct evaluation? Some tips to improve the potential influence of evaluation

When: Monday, March 30 from 9:00 to 12:30

Where: Room 6

Number of participants: 25

Level: Intermediate

Language: French with simultaneous interpretation in English and Arabic

Course objectives:

1. Get familiarized with elements that strengthen the quality of the evaluation process;
2. Get familiarized with the causal elements that enhance the usage of an evaluation;
3. Understand the context and trigger factors to enhance the influence of the evaluation;
4. Sensitize the evaluator about the implications and impact of his/her evaluation.

Content

Three key words, *quality of evaluation*, *usage* and *potential influence* of the evaluation in the environment and context it takes place. Those are the key elements to optimize the impact of evaluation in different contexts. During the workshop, participants will explore various approaches where evaluations contribute to the governance of a specific policy, programme or initiative (decision making, accounting) or to its continuous improvement (change of practice, organizational learning, change-management).

For each experience, the following questions will be answered « For Whom » and « Why » do we conduct evaluation and « what has been done or what could have been done to improve the quality, usage and potential influence of the evaluation ». This workshop will help participants improve their immediate reactions while dealing with evaluation practices.

Facilitator bio

Marie Gervais, Ph.D. in monitoring and evaluation at l'Université Laval while practicing ergotherapy and psychology. She is currently professor in the Department of preventive and social medicine at l'Université Laval and scientific director of the research centre in the Health and Social Services Centre of la *Vieille-Capitale*. She was also director of research and evaluation for the Government of Québec from 2001 to 2006. She has been active in the evaluation community for 18 years, her interests in research are focused on evaluation of health programmes and policies, capacity building for evaluation, organization of services, governance support, knowledge transfer and change management. She was awarded in 2007 by the Société québécoise d'évaluation de programme (SQEP) for her exceptional contribution in promoting evaluation practices in Québec.

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