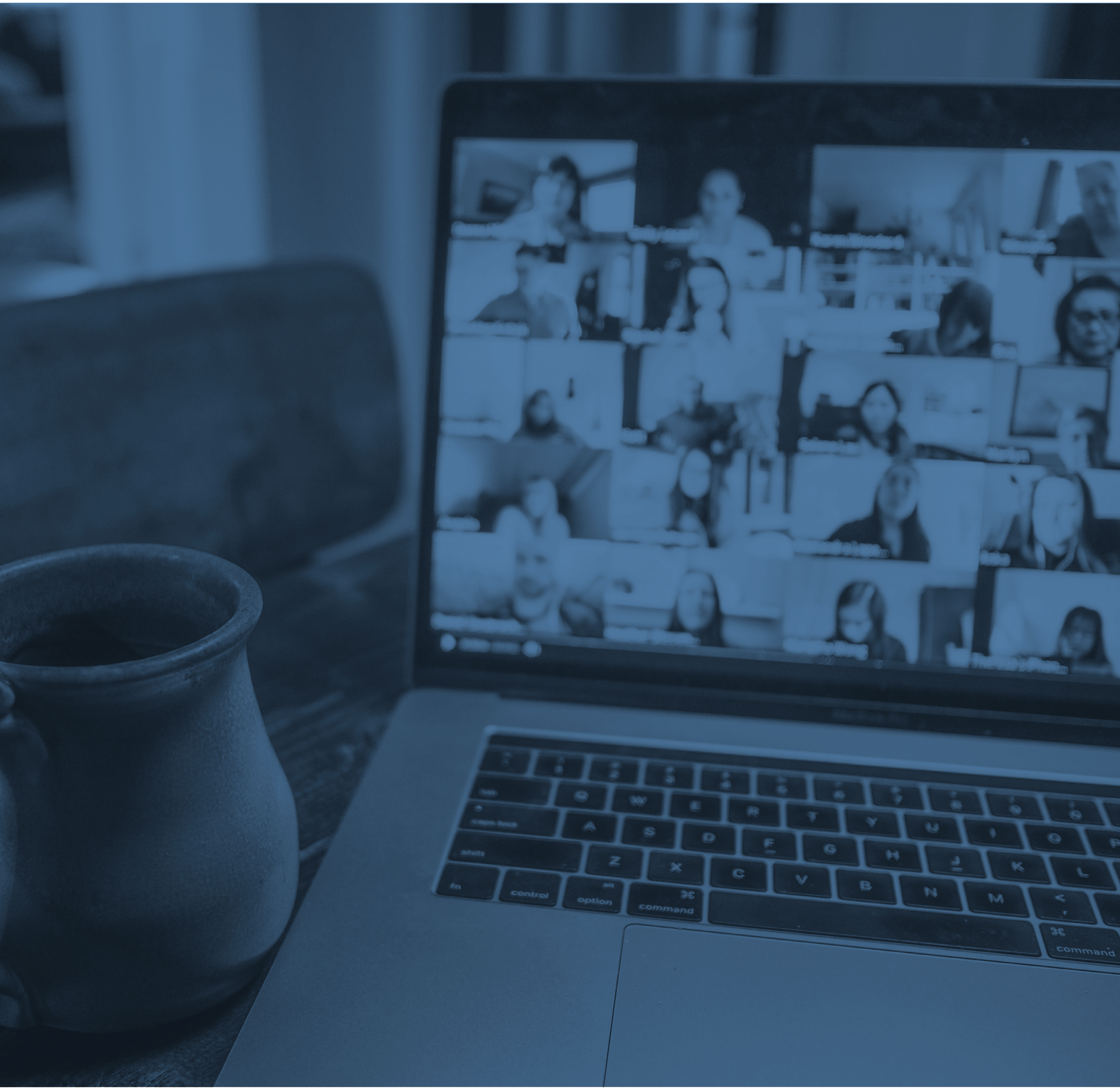
# REMOTE EVALUATION TECHNICAL MANAGEMENT GUIDE



**SOCIAL IMPACT, INC.**
APRIL 2022

**AUTHORS:** CHRIS THOMPSON, TECHNICAL DIRECTOR
PAIGE MASON, TECHNICAL DIRECTOR

# TABLE OF CONTENTS




*Photos:*
*Front Cover Credit: Chris Montgomery*
*Pages 3 & 11 Credit: LinkedIn Sales Solutions*
*Back Cover Credit: Dylan Ferreira*

# INTRODUCTION

**Though many researchers are well adapted to the realities of virtual data collection, especially since the COVID-19 pandemic, we still face daily challenges with remote evaluation team management, communication, and collaboration. This guide aims to provide information for managers on how to remotely administer the technical aspects of evaluations and to present options and recommendations for innovative, responsible, and safe approaches to measure programs without field-based travel. It formally shares learning from Social Impact, Inc.'s (SI) internal knowledge exchanges, which informed a Remote Evaluation Technical Management Blog Series, tailors it to each stage of the evaluation lifecycle, and provides a practical tool for users to immediately apply these lessons.**

**Drawing from experience conducting field-based and (now) remote evaluation for international development clients including the US Agency for International Development (USAID), the US Department of State, and the Bill and Melinda Gates Foundation, this guide compiles our challenges, lessons learned, and promising practices for the wider development community. We hope to strengthen the evidence base on evaluation practices to help other organizations adapt to deliver evaluations remotely when the need arises.**

# REMOTE EVALUATION TECHNICAL MANAGEMENT

## PLANNING

### WHAT IT ENTAILS

Planning for an evaluation involves deciding whether to evaluate in the first place and then defining the evaluation's parameters, engaging with partners and stakeholders, and preparing a scope of work (SOW). The decision whether to evaluate can be a function of regulations and organizational policies. It can also relate to the needs of an evaluation's users, perhaps to address funding decisions, explain unexpected results, or address issues of sustainability, cost-effectiveness, or relevance.

Once a manager decides to evaluate, the manager must articulate the evaluation's purpose and clarify roles among commissioning organizations, partners, and stakeholders. This may also be the time to consider cost estimates and whether to use internal or external evaluators. Managers describe these decisions and others about evaluation questions, design and methods, deliverables, team composition, and schedule in a SOW, which is then conveyed to evaluators, either directly or through a procurement or recruitment process.

### WHO IT INVOLVES

**Commissioning Organization**

- Evaluation manager commissioning the evaluation
- Parties interested in the evaluation results

## REMOTE CHALLENGES & SOLUTIONS

| CHALLENGES | POTENTIAL SOLUTIONS |
|---|---|
| The information needs may be urgent, so the time required to plan and execute an evaluation is limited. Many factors might drive urgency in an evaluation, including a pending decision on funding, an emergent need for a programmatic course correction, or regular cycles of strategic planning. | Prioritize what information is critical for upcoming decisions and align this with what is feasible to complete in the time you have. In a remote setting and pandemic conditions, it is especially important to consider the question of feasibility, as there may be populations that are more difficult to reach quickly. Some questions you may ask in planning an evaluation under time pressure include:<br>• What amount of information is "good enough" to proceed?<br>• Are there respondent groups that should be prioritized?<br>• Should we sequence evaluation questions, so the most urgent information comes sooner?<br>• Do we need a full-scale evaluation, or would a targeted rapid assessment be more suitable? |
| It can be more difficult to reach alignment across key users of evaluation. Especially with limitations on in-person meetings and fewer available "windows" of time to meet when users are in different time zones, reaching alignment on the evaluation purpose through shared documents and email can become arduous. | Facilitate a virtual workshop to agree upon the evaluation purpose and a focused set of evaluation questions which can accelerate this process, especially when using virtual collaboration tools such as Google Docs, Miro, Mentimeter, or Jamboard. Across a two-hour workshop, the facilitator and/or evaluation manager can drive a group of users towards a shared purpose and identify priority information needs for the evaluation. A proposed schedule could be:<br>• Host "vision setting" workshop (2 hours) to determine evaluation purpose and priority information needs.<br>o Explore topics surrounding evaluation use—what will we use this evaluation for? What decisions do we hope to make following this evaluation? What information do I need to make these decisions? What information will be most helpful for future programming?<br>o Prioritize emerging information needs.<br>o Discuss feasibility of responding to information needs. What kind of data would be required? How quickly do I need this information?<br>• Draft research questions in a shared document for feedback and later host an evaluation question "refinement" meeting (1 hour) to discuss feedback.<br>This process will give guidance to the evaluation team so they can respond to the highest priority information needs. |
| Expectations for remote evaluation timelines are often too concise for best practices for remote evaluations. | Set expectations for remote evaluations early, as some evaluation users will expect remote evaluations to have shorter timelines and fewer expenses. As we demonstrate throughout this guide, remote evaluations benefit from timeline flexibility which allows more nuanced and collaborative approaches with adequate resourcing. The following points may be helpful:<br>• Respondents may be more challenging to reach, so a lengthy data collection window increases the likelihood that all groups will be sufficiently represented in the study.<br>• Lengthy data collection and analysis phases allow for more iterative assessment with greater potential for participatory validation exercises and co-creation activities which strengthen the likelihood recommendations prove useful.<br>• With evaluation teams, commissioners, and respondents dispersed across multiple time zones, there may be fewer working hours available for data collection and team meetings. |


Credit: Good Faces

### SPOTLIGHT EXAMPLE

In 2020-2021, SI conducted a cross-sectoral assessment of USAID/Jordan's youth development activities. The study incorporated participatory approaches, specifically Most Significant Change and youth-led data collection. It was initially planned to have international travel and in-person data collection but shifted to a remote format in March 2020 due to COVID-19 travel restrictions. While the team adapted data collection tools and selected remote platforms to use, the initial re-design maintained a similar timeline for the evaluation start-up phase. However, the team began experiencing delays unique to remote evaluation. For example, due to time zone differences data collection training had to be divided into several sessions over multiple days, pushing back the timeline. Despite initial thinking that less time was needed given the lack of travel, the team learned that remote evaluations benefit from more calendar time to allow for greater scheduling challenges. With multiple time zones, there are fewer working hours available for the team to meet, collaborate, and generate knowledge.

# START UP

## WHAT IT ENTAILS

Starting up an evaluation transitions it from the planning and development phase to implementation, which commonly entails recruiting a team of evaluators and orientating and planning to field them. In the recruitment process, managers verify the capabilities of candidates and convey expectations for their performance. Evaluation teams may include expatriate and local evaluators with a mixture of subject matter and methodological expertise per the SOW.

Managers then onboard the evaluation team, integrating them in the organization, making new tools and background information available, and introducing team members to foster collaboration. Often simultaneously, managers commence logistics, including international and domestic travel, lodging arrangements, scheduling, and security plans. Evaluation methodology and sampling influence logistics, and further coordination with commissioning organizations and partners may be necessary at this stage.

## WHO IT INVOLVES

### Commissioning Organization

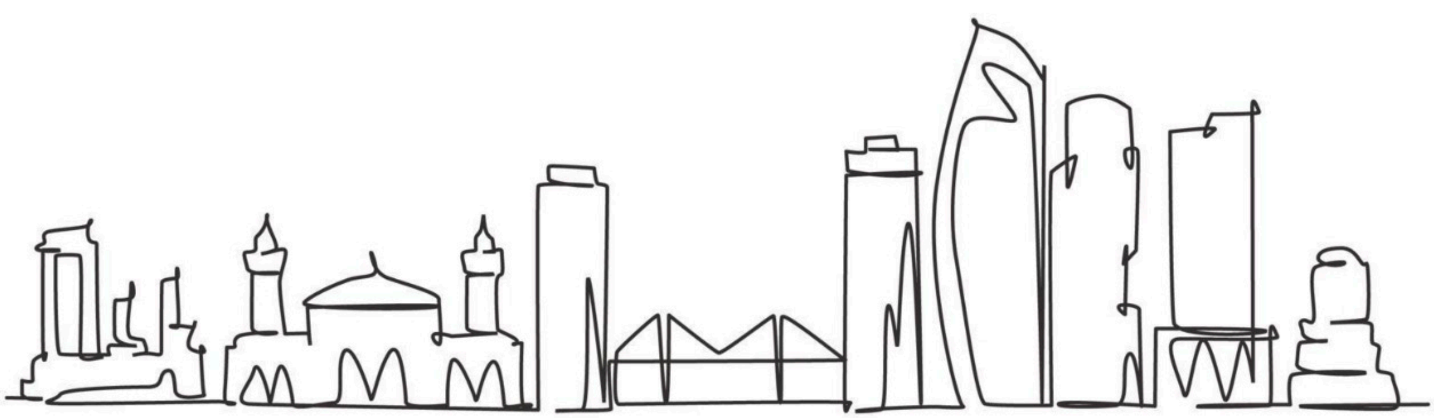
- Evaluation manager commissioning the evaluation

### Evaluation Team

- Evaluation team leader and other senior team members
- Evaluation manager and other staff responsible for technical oversight

## REMOTE CHALLENGES & SOLUTIONS

| CHALLENGES | SOLUTIONS |
|---|---|
| Evaluation team members may struggle with having less access to managers and managerial support and communication. Team members can perceive remote managers are out of touch with their needs and not supportive to their work. | Establish structured daily or weekly check-ins, and create project milestones that have precise deadlines, even if they are not explicit deliverables from the SOW. |
| There may be a lack of clear expectations between evaluation managers and teams, which may need further guidance and directives to understand how to accomplish an objective, when to respond to communications, or when they should attend virtual meetings. | Set expectations early and often, especially around priorities, milestones, and performance goals and create well-documented procedures. In team planning meetings, use your time to discuss ongoing progress and potential obstacles. |
| It is more challenging to build rapport among team members without in-person meetings and organic, ad hoc exchanges that would have happened in person. | Allow time and space for informal exchanges, using video conferencing when bandwidth allows and organizational social networking platforms like Microsoft Teams. Consider ideas like having lunch together virtually or even stretching or meditation if organizationally and culturally appropriate. |
| Many conferencing platforms currently in use prompt a shift into a "professional" mindset. Team members tended to be more measured with their words, rather than sharing "half baked" thoughts that might inspire others to share and brainstorm. | Consider channels other than organization platforms (e.g., WhatsApp) where team members are used to being informal and connecting. Active employment of technology that team members already use can break down the formality and allow team members to connect in smaller groups. |



# DESIGN

## WHAT IT ENTAILS

In this stage, managers and their teams validate an evaluation's design internally via a desk review and externally by delivering an inception report to commissioning organizations and stakeholders. While some evaluations involve extensive meta-analyses, most use desk reviews to make sampling determinations, and identify external data for triangulation and preliminary findings. Inception reports serve as an evaluation's work plan and solidify its purpose, questions, deliverables, and reporting and communication plans.

Once commissioning organizations, programs being evaluated, and stakeholders confirm these aspects, managers work with evaluation teams on in-country fieldwork logistics and scheduling data collection. This can involve arranging ground transportation, equipment, and travel advances and contacting respondents. Oversight becomes critical as team members incur expenses and subcontractors may become involved in data collection.

## WHO IT INVOLVES

### Commissioning Organization

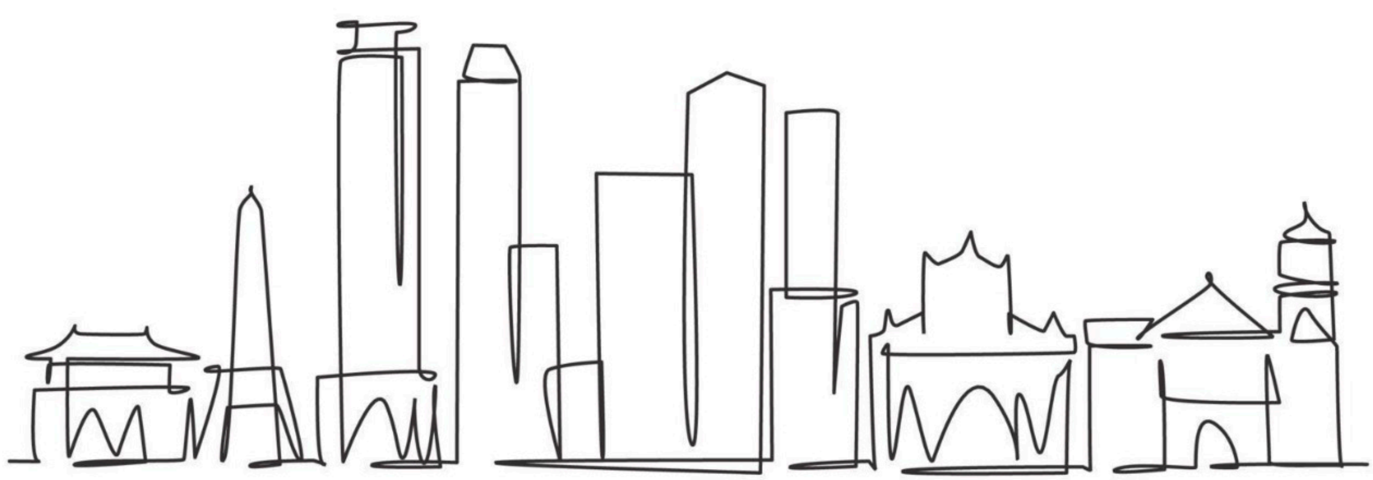
- Commissioning organization
- Evaluation manager commissioning the evaluation
- Other organizational technical and managerial staff

### Evaluation Team

- Most if not all team members, including the team leader and in-country specialists
- Evaluation manager and other staff responsible for technical oversight
- Program being evaluated
- Stakeholders and counterparts

## REMOTE CHALLENGES & SOLUTIONS

| CHALLENGES | SOLUTIONS |
|---|---|
| As managers and teams begin working in different time zones, expectations for synchronous work can persist, either formally or informally. For example, constant messaging from an application like Microsoft Teams or WhatsApp can cause anxiety for those in other time zones when they receive messages in all hours of the night and on weekends. This also applies to people joining meetings late at night or early in the morning. | Establish boundaries and set realistic expectations around attending meetings and responding to after-hours work emails and texts. This can be as straightforward as setting working hours in online office calendars. Ensure a partial day overlap where the entire team is online for at least 2 hours together for synchronous work. One way to operationalize asynchronous work is recorded video updates from team members. |
| In cases where teams try to introduce technological solutions to remote design, often more time than anticipated is needed on practicing and socializing instruments before they become effective for collaboration. | Keep it simple, as technology has been a learning curve for everyone. Using familiar tools can foster greater participation. Google Docs, Sheets, and Slides are easy, and there is no need for occasional users to create an account. |
| Fieldwork logistics and data collection scheduling constraints may become apparent in this stage. Coordinating between actors to arrange data collection approaches like interviews, focus groups, and surveys takes additional time and affects the availability of the evaluation team, respondents, and subcontractors. | Increase the calendar time for data collection to allow a larger window in which to reach respondents. Identify mitigation plans if certain respondent groups are more challenging to reach or face bandwidth issues for interviewing. Be clear about the limitations of this design and implications on how the findings can be interpreted. This involves communication with the organization commissioning the evaluation to ensure that expectations are aligned. |



# FIELDWORK

## WHAT IT ENTAILS

An evaluation's fieldwork focuses on collecting data to answer its research questions and then presenting preliminary findings to in-country audiences. An evaluation's methodology informs its data collection whether it uses quantitative (surveys) or qualitative (interviews and focus groups) techniques. Evaluation managers supervise the team's application of these methods to ensure a high level of data quality, which is necessary to generate sound findings, conclusions, and recommendations.

Although the sequence of data collection, analysis, and reporting may vary (see sections below), fieldwork typically involves presenting preliminary findings to commissioning organizations, programs being evaluated, and stakeholders towards the end of data collection. This can also occur in an out-brief, where managers ensure their teams build commitment among evaluation users and avoid surprises by introducing preliminary conclusions and recommendations. However, conducting evaluations remotely does allow greater flexibility in the way that engagement around preliminary conclusions and recommendations can take place. Fieldwork may also begin with an in-brief to review and discuss aspects of the inception report and build engagement with partners ahead of data collection.

## WHO IT INVOLVES

### Evaluation Team

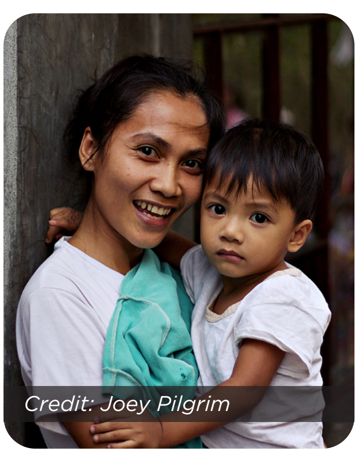
- Most if not all team members, including the team leader and in-country specialists
- Evaluation manager and other staff responsible for technical oversight

### Program being evaluated

### Stakeholders and counterparts

## REMOTE CHALLENGES & SOLUTIONS

| CHALLENGES | SOLUTIONS |
|---|---|
| Some evaluation team members may experience low productivity in remote settings. Perhaps they lack access to equipment or high-speed internet or did not get into development work to not travel, or have difficulty with in-person check-ins. In other cases, low productivity may be a wperception that is not necessarily true. This may be the case in teams where members have not worked together, and some may think others are not working only because they cannot see them. | Keep everyone advised on who is doing what and by designing a structure for teams that defines clear roles and responsibilities and sets a clear timetable. Productivity remotely depends on predictability and structure. Basic work plans and trackers that use Gantt charts are one option for communicating progress and workload. Regardless of the tool, all team members should be empowered to update it regularly and use it to report challenges and successes. |
| During fieldwork, a lack of team cohesiveness may develop. This may be likely if some members, such as in-country enumerators, are doing more work than others or taking more risks being in the field. They may also have less access to equipment and technology than other members. | Strive to find a way to extend the same benefits, equipment, etc. to all. Evaluation managers should try to make everything as fair as possible and show intentional effort to eliminate unconscious bias in how remote members are treat vis-à-vis in-country members. |
| "Interview stacking" during the hours that are convenient for all time zones may leave very little time for reflection throughout the data collection period. Team members may experience high levels of fatigue due to late-night or early-morning interviews to accommodate time zone differences | Take breaks during data collection and build in time for reflection and processing (both individually and as a team) and to combat evaluator fatigue. An expanded timeline for data collection allows this. Evaluation managers and team leaders should communicate to staff that they support regular breaks and mealtimes. |



*Credit: Joey Pilgrim*

## SPOTLIGHT EXAMPLE

SI conducted an endline evaluation of the US-Philippines Child Protection Compact Partnership from 2020-2022. The team members were based in the Philippines, Europe, and the US, making the available windows for working together limited. Despite challenges, the team also had significant advantages, as it was the same team that conducted the in-person baseline assessment in 2018. With relationships already established, the team quickly established a rhythm of connecting and reflecting to re-create the ad hoc and organic exchanges that would have happened with in-person fieldwork. During data collection, the team took a one-week reflection break to process what they had heard, identify gaps, and align on priorities for the remainder of data collection. The team also held "interpretation sessions" for each evaluation question aided by a virtual whiteboard using Miro to draw connections and reflect on the interviews that team members had participated in. With these informal, loosely structured touchpoints, the team could maintain momentum and optimize gains from the strong relationships they had built over time.

# ANALYSIS

## WHAT IT ENTAILS

Analysis begins after or concurrently with data collection and involves systematically cleaning, describing, and modelling data to discover useful findings and make informed conclusions and recommendations. Evaluation managers assist their teams with applying qualitative and quantitative analysis techniques, which are often specified in inception reports and maintaining the data quality necessary for credible findings.

Managers also ensure the findings, conclusions, and recommendations generated through analysis fully address evaluation questions from the SOW. At this time, evaluation managers and teams may discuss how to deliver negatives findings to audiences and begin generating impactful graphics and other visualizations to convey information in the subsequent reporting and learning steps.

## WHO IT INVOLVES

### Evaluation Team

- Most if not all team members, including the team leader and in-country specialists
- Evaluation manager and other staff responsible for technical oversight

## REMOTE CHALLENGES & SOLUTIONS

| CHALLENGES | SOLUTIONS |
|---|---|
| In remote work, spontaneous face-to-face engagement disappears which can challenge participatory analysis. These conversations must now be intentional and planned. | Block certain times of the day when you are available for short analysis and discussion sessions. Many short ones are better than one long one, so team members have a chance to pause and reflect before rejoining the analysis conversations. |
| Depending on the team's power dynamics and team members' comfort with communicating in English or the dominant language among team members, local team members may be reluctant to participate in analysis processes. | Ensure that each team member has a "niche" to focus on in analysis, empowering them to speak with confidence on that topic. Visual collaboration software like Miro can strengthen collaboration in remote analysis, reflection, and sensemaking workshops. |
| During remote meetings, the team's senior members may be more willing to speak up, with less participation from others. | Encourage and assign areas of expertise for each team member to handle, emphasizing the importance of everyone's perspectives. With this, team members may be more willing to chime in on their areas of expertise and play a more active role in inviting feedback. |

# REPORTING

## WHAT IT ENTAILS

The reporting process communicates findings, conclusions, and recommendations that address evaluation questions to commissioning organizations, the program being evaluated, and stakeholders and fulfills the SOW's deliverables. It typically involves delivering a draft report, receiving feedback, and then finalizing the report. Managers work with their teams to ensure reports are evidence-based, meet funder's quality standards and templates, and systematically incorporate comments from audiences.

Based on the SOW and institutional context, managers may collaborate with evaluation teams to design reports or other materials that meet their users' needs. This often includes a standalone, comprehensive executive summary for those who may not read the entire report and could also involve infographics, videos, and other practical learning materials.

## WHO IT INVOLVES

**Commissioning Organization**

**External evaluator**

- Most if not all team members, including the team leader and in-country specialists
- Evaluation manager and other staff responsible for technical oversight

**Commissioning Organization**

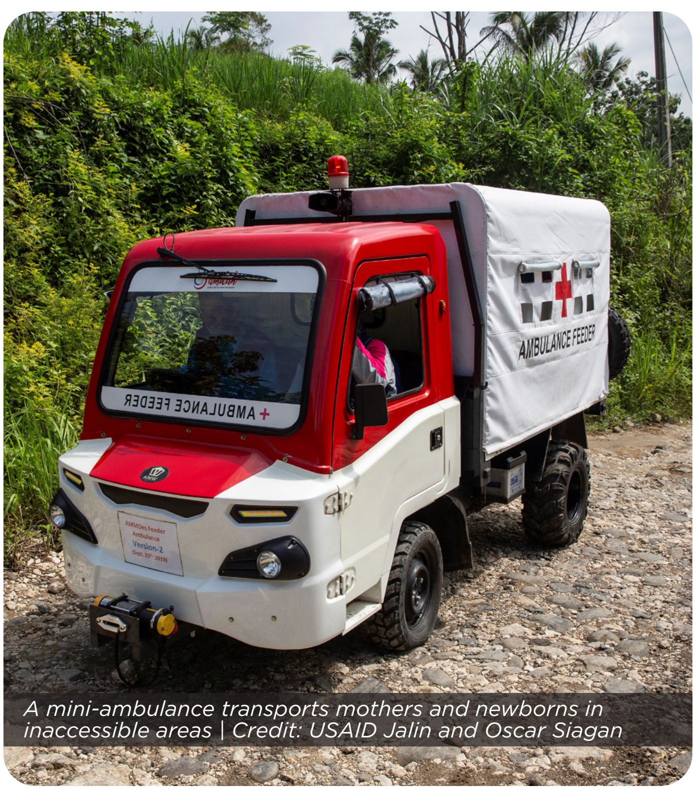
- Evaluation manager commissioning the evaluation
- Other organizational technical and managerial staff

**Program being evaluated**

**Stakeholders and counterparts**

## TOP REMOTE CHALLENGES

| CHALLENGES | SOLUTIONS |
| --- | --- |
| During reporting, evaluators are focused on synthesizing and presenting the findings, conclusions, and recommendations to share with key users. This can often be done in isolation with fewer opportunities for teams to meet and share writing responsibilities across the team. | Create opportunities for the evaluation team to connect to work through the challenges of how to present information. It is helpful to use asynchronous report reviews, followed by targeted meetings to further develop the findings for individual evaluation questions in the text. |
| Those responsible for receiving, reviewing, and approving the report are facing many of the same constraints on time and energy as the evaluation team. Lengthy report reviews may be de-prioritized. | Consider whether a lengthy report is needed to meet the information and utilization needs of the organization commissioning the evaluation. A high level of engagement around the preliminary findings, conclusions, and recommendations can make report reviews less daunting. Are there other products that would be as effective? Such as a detailed slide deck, accompanied by an executive summary? |



*A mini-ambulance transports mothers and newborns in inaccessible areas | Credit: USAID Jalin and Oscar Siagan*

## SPOTLIGHT EXAMPLE

SI's Developmental Evaluation (DE) for USAID Jalin in Indonesia from 2018 to 2021 supported the co-creation of innovations to improve maternal and newborn health (MNH) and started remote work when most its reports and deliverables were scheduled. The DE's team worked from the US and Indonesia and included members who joined after going remote and never worked in person with their colleagues. Furthermore, COVID-19 response efforts constrained the time and resources that USAID and the Indonesian Ministry of Health had for MNH and the DE. In response, the DE built camaraderie by establishing a WhatsApp chat for informal messaging and weekly team and one-on-one meetings and sending staff gifts of appreciation like flowers and chocolates and food deliveries for virtual lunches. This spirit of teamwork helped to pick up new skills and rapidly pivot from text-heavy reports to visually appealing and concise videos, infographics, and online maps that rapidly conveyed recommendations to donors and counterparts in the time they had available. It also physically mailed graphic posters with findings to stakeholders to capture their attention, because everyone still likes to get mail! By maintaining team cohesion and pivoting to better suited deliverables, the DE enabled innovations like a miniature ambulance (see photo) and MNH pop-ups to scale impacting mothers and newborns across Indonesia.

## OPTIMIZING OPPORTUNITIES

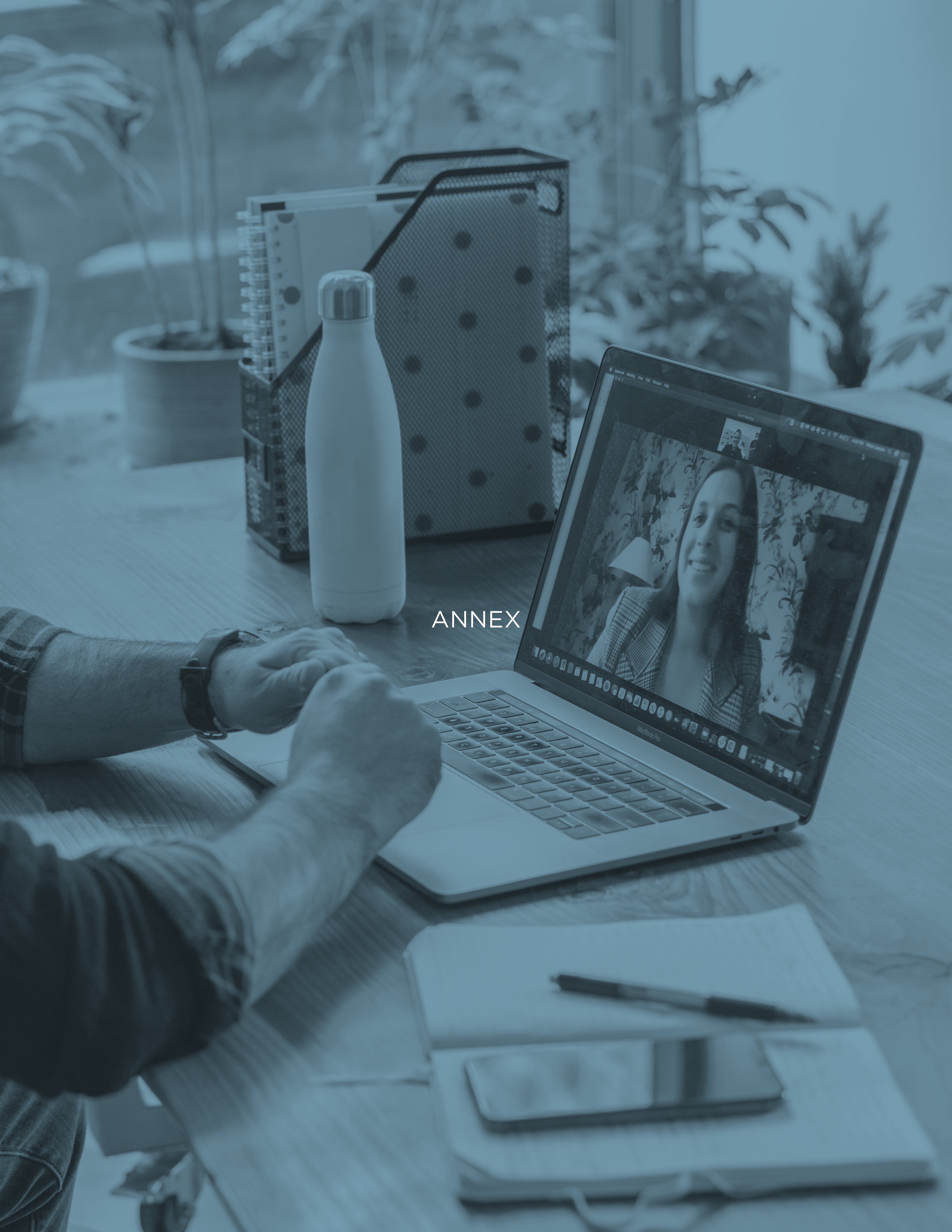
In many remote evaluations that employed the strategies described above, we found that we were able to increase the level of engagement within the team and with evaluation commissioners and primary and secondary evaluation users compared to in-person studies. Virtual gatherings and data collection methods have the potential to be more inclusive, less logistically complicated, and more effective in how information is gathered, analyzed, and shared. A few of the distinct opportunities across our remote monitoring, evaluation, research, and learning (MERL) activities include:

| OPPORTUNITY | HOW TO OPTIMIZE |
|---|---|
| Remote data collection gives access to a wider range of respondents. | Balance breadth and depth. For example, if you have more geographic sites in your sample, will you be able to reach a sufficient level of depth (or number of respondents) to be able to draw conclusions across sites? Also, think about the opportunities this presents for hearing from respondent groups not usually represented in a study. Perhaps they live in difficult-to-reach locations, but you would be able to gather their perspectives through remote data collection approaches. That said, marginalized groups may also have more restricted access to technology for remote data collection (e.g., phone sharing, inconsistent Internet access). If this affects your respondents, consider how they will be represented in the study, whether additional measures are needed to ensure participation, and how the information they share can be protected. |
| Elevate local voices and insights . | The contextual understanding and expertise that local MERL specialists bring can be elevated in a remote study. During design and data collection, local specialists can be drivers of adaptation. They should be involved in feedback loops to reflect what is working well and what should be changed so the evaluation is responsive to changing situations on the ground. During dissemination, opportunities exist to host more dissemination events targeted to different audiences to present findings customized to the varying needs of local audiences. |
| Extend timeframe for more nuanced results. | Because of time zone differences and challenges scheduling data collection, remote evaluations sometimes occur over a longer period than in-person evaluations. There are several benefits to this extended timespan, such as providing team members more chances to digest and reflect upon data as it is collected, either formally through pausing and reflecting or informally through online chats. It is also easier to follow up on leads and lines of inquiry when the team is not limited to a certain number of days or weeks in country. MERL designs may consider lengthy and flexible windows of data collection, with several checkpoints throughout to share emergent findings around targeted issues, so that there is a regular flow of information to evaluation key users. |

## CONCLUSION

The COVID-19 pandemic has led to a global shift in expectations around where evaluation is performed. The new emphasis on remote work has influenced the technical methods used by evaluators and the management, communication, and collaboration approaches applied by those who support them. We hope this guide has offered our colleagues in the MERL community a few solutions to their challenges of administering the technical aspects of evaluations remotely and safely when field-based travel is not possible, for whatever reason, whether in our present pandemic or the future.

# ANNEX



# ANNEX
# REMOTE EVALUATION TECHNICAL MANAGEMENT CHALLENGE
## SOLUTION FRAMEWORK

| EVALUATION STAGE | CHALLENGES | | | SOLUTIONS | |
|---|---|---|---|---|---|
| | **Is your team experiencing?** | **Yes** | **No** | **Has your team tried?** | **Outcomes** |
| **Stage 1: Planning** | Different platforms for communication and file sharing. | | | Share calendars to schedule planning meetings more efficiently. | |
| | More limited time to complete work remotely than in-person. | | | Prioritize critical information for decisions and align this with the time available. | |
| | | | | Add additional calendar days to the timeline to ensure time for adequate data collection | |
| | Difficulty reaching key evaluation users. | | | Host targeted design consultations with stakeholder groups. | |
| | | | | Gather input through asynchronous methods. | |
| | *Other challenges:* | | | *Other solutions:* | |
| **Stage 2: Startup** | Impeded access to managers and managerial support and communication. | | | Establish structured regular check-ins. | |
| | | | | Create project milestones with precise deadlines, even if they are not explicit deliverables from the SOW. | |
| | Lack of clear expectations between evaluation managers and teams. | | | Set expectations early and often around priorities, milestones, and performance goals. | |
| | More guidance than usually needed to understand how to accomplish an objective. | | | Create well-documented procedures, and in planning meetings, use your time to discuss obstacles. | |
| | Challenge building rapport among team members. | | | Allow time for informal exchanges (video conferencing, organizational social networking and ideas like virtual lunch or stretching). | |
| | | | | Consider channels other than organization platforms (ex. WhatsApp) where team members are used to being informal and connecting. | |
| | *Other challenges:* | | | *Other solutions:* | |
| **Stage 3: Design** | Persistent, unfair expectations for synchronous work, either formally or informally. | | | Set realistic expectations around meetings and responding to after-hours emails, setting work hours in calendars or ensuring a partial day overlap where the team is online for at least 2 hours. | |
| | More time is needed on practicing an instrument before it can be useful for collaborate. | | | Use familiar tools to foster greater participation (Google tools are straightforward and users do not need to create a new account). | |
| | Scheduling constraints when coordinating between several actors to arrange data collection. | | | Increase calendar time for data collection to allow for a window in which to reach respondents and develop mitigation plans early in case issues persist. | |
| | *Other challenges:* | | | *Other solutions:* | |

| EVALUATION STAGE | CHALLENGES | | | SOLUTIONS | |
|---|---|---|---|---|---|
| | **Is your team experiencing?** | **Yes** | **No** | **Has your team tried?** | **Outcomes** |
| **Stage 4: Fieldwork** | Low productivity (perhaps due to lacking access to equipment or high-speed internet or other reasons). | | | Check to ensure that team low productivity is not a misperception. | |
| | | | | Design a team structure that defines clear roles and responsibilities and sets a clear timetable and empower team members to use it regularly. | |
| | Lack of team cohesiveness (if some members are doing more work than others or taking more risks). | | | Eliminate unconscious bias in how members are treated and extend similar equipment and benefits to all. | |
| | Less time for reflection during data collection and high levels of fatigue due to late-night or early-morning work due to time zone differences. | | | Allow time for reflection and processing individually and as a team, communicating to staff support for regular breaks and mealtimes. | |
| | *Other challenges:* | | | *Other solutions:* | |
| **Stage 5: Analysis** | Slower, less participatory analysis as conversations must be intentional and planned. | | | Block certain times for short analysis and discussion (perhaps multiple short sessions so team members can pause and reflect before rejoining). | |
| | In-country team members may be reluctant to participate in analysis (perhaps due to power dynamics or comfort with the dominant team language). | | | Ensure each team member has a niche to focus on in analysis and use visual collaboration software to strengthen reflection and sensemaking. | |
| | Senior members speak up more often and the team does not get sufficient opportunities to hear enough from others. | | | Encourage and assign areas of expertise for each team member to handle, emphasizing the importance of everyone's perspectives. | |
| | *Other challenges:* | | | *Other solutions:* | |
| **Stage 6: Reporting** | A feeling of "unbelonging" or lack of productivity when one or two team members are assigned large sections of the report to write. | | | Strive to maintain social connections via an open fun chat channel or "virtual coffee" and listen and offer encouragement and support. | |
| | Lengthy report reviews may be de-prioritized, as those responsible for receiving, reviewing, and approving the report face many of the same constraints on time and energy as the evaluation team. | | | A high level of engagement around the preliminary findings, conclusions, and recommendations can make report reviews less daunting. | |
| | | | | Consider whether a lengthy report is needed to meet the information and utilization needs of the commissioning organization (are there other products that would be just as effective?). | |
| | *Other challenges:* | | | *Other solutions:* | |

SOCIAL IMPACT

ADVANCING DEVELOPMENT EFFECTIVENESS