

Please share in the chat:

- Your name
- Organization/location, and
- What you hope to get out of this workshop

Today's Presenters



**Elise
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Senior Manager,
Global WASH



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Global Director,
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Research & Learning (MERL)



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**Where We Are Headed
Together in the Next
Hour**

- 1 BACKGROUND
- 2 OUR PROCESS
- 3 WHERE WE ARE IN THE HCD PROCESS
- 4 “PEVAL” IN ACTION: MSC Pilots
- 5 Q&A



Learning Objectives:

- ❑ Understand both *human-centered design* (HCD) and *participatory evaluation* (PEval) in the development space
- ❑ Follow up on how to use the HCD process to explore PEval implementation
- ❑ Share steps beyond HCD to implement PEval in multiple countries



Expectations Setting

- Continuation of our session last year to update on our next steps
- We are not experts in participatory evaluation
- iDE is known for HCD and rigorous measurement
- So we are excited to share our process - how we've learned what we've learned so far:
 - ◆ How to get started
 - ◆ How to be participatory about participatory eval
 - ◆ Prototypes and pilots
- We welcome questions, comments, and feedback to strengthen our work



A landscape photograph of a sunset over mountains. The sun is low on the horizon, casting a warm orange glow across the sky and the silhouetted mountain ranges. The foreground shows dark silhouettes of trees and a small building. A solid red horizontal band is overlaid across the middle of the image, containing the text '1. BACKGROUND' in a bold, grey, sans-serif font.

1. BACKGROUND

What iDE Does

iDE is a non-profit with work in 10 countries, four social enterprises, employing over 1,400 people directly, and many more indirectly through market-based approaches





**Markets
for WASH**



iDE
Our Expertise



**Agriculture for
Entrepreneurs**



NUTRITION

Vitamin-rich crops provide families and communities with the energy and mental ability they need to be successful.

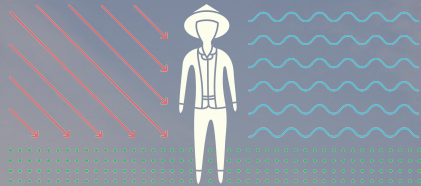


GENDER EQUALITY

Men and women participate as customers and entrepreneurs, strengthening their families and livelihoods.

ide

Cross-Cutting
Impacts



RESILIENCE TO CLIMATE CHANGE

Farmers have access to practical strategies to deal with unpredictable weather and its effects.



FOOD SECURITY

Sustainable farming practices ensure the availability of food while protecting the environment and health of communities.



Start with People

Use Human-Centered Design to understand people's lives, the barriers, and accelerators.



Design to Context

Ask people what they want, prototype designs, and incorporate user feedback until we have a final product that is affordable and desirable.



iDE

Our Pillars



Business Delivers

Mobilize the local private sector by building a strong business case for products and services to rural households. Reduce the risk of market entry, and build connections between key market actors.



Results Rule

Collect and analyze real-time data on quality, cost-effectiveness, and performance, allowing us to prioritize investments.

Gender Equality & Social Inclusion (GESI) Policy

iDE

Our Context

- Approved in 2020
- “...**Ensure evaluations** and reviews do no harm, **are participatory**, and assess progress towards gender equality and inclusive outcomes.”

iDE Definition of Participatory Evaluation

Participatory evaluation is an approach to evaluation design that aims to **redefine the process of who initiates and implements evaluation** by involving all stakeholders such as the project clients, staff, implementers, funders, and any other involved community or local government members.

The intention is to **make local knowledge the foundation of the evaluation design to improve measurement and its relevance in the project context**, build the skills of all involved, and collaboratively define what project success looks like.

iDE

Our Definition

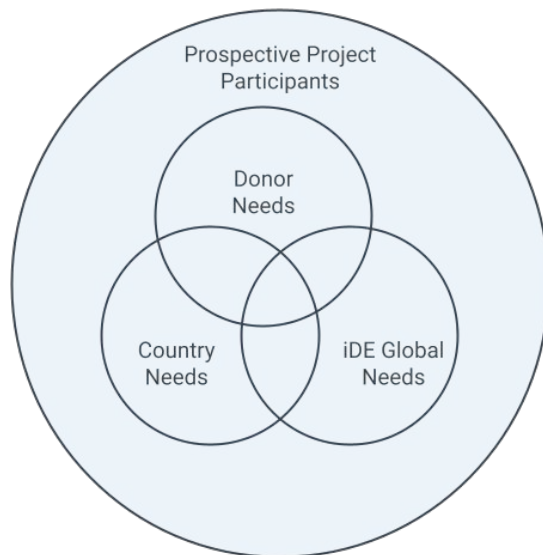
Where we are now...



Where we want to be in one year...

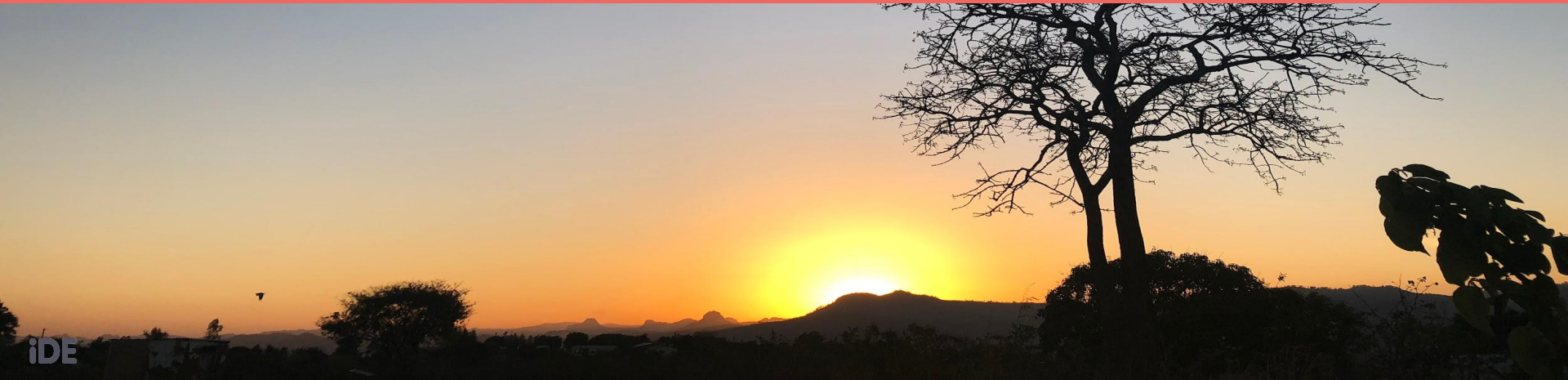


Where we would like to be in 2-3 years...



Our vision for the role of participatory evaluation design over the next few years

2. OUR PROCESS



How did we get started on “PEval”?

Phase 1: OCTOBER 2021 to MAY 2022

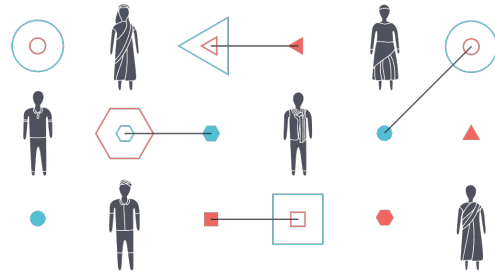
START WITH PEOPLE

Small group brainstorming



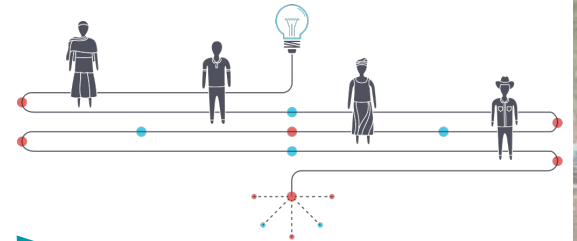
DESIGN TO CONTEXT

Group learning about HCD



DESIGN TO CONTEXT

Began implementing steps in the HCD process



How did we get started on "PEval"?

Phase 1: OCTOBER 2021 to MAY 2022

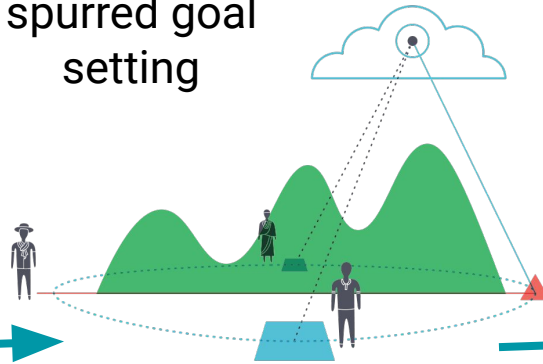
DESIGN TO CONTEXT

Identified and confirmed a project to pilot PEval



BUSINESS DELIVERS

Sought internal and external funding which spurred goal setting



BUSINESS DELIVERS

Worked on building buy-in through working groups, invitations for input, and thought leadership



How are we taking “PEval” to the next level?

Phase 2: JUNE 2022 - JUNE 2023

DESIGN TO CONTEXT

Organized a Training of Trainer session with an external trainer and our PEval Working Group



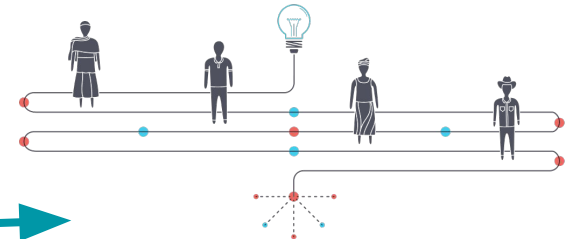
DESIGN TO CONTEXT

Full day planning session with Working Group to take PEval forward



BUSINESS DELIVERS

Began work with the Business Development (BD) team to get PEval into proposal



How are we taking “PEval” to the next level?

Phase 2: JUNE 2022 - JUNE 2023

DESIGN TO CONTEXT

Began cascading the training sessions to MERL and GESI country leads, including mini-pilots



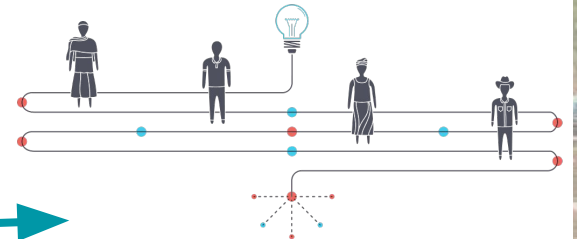
DESIGN TO CONTEXT

Organized many project-specific planning sessions for implementation



BUSINESS DELIVERS

Actively working on pilots in all countries, more training, tool development, and inclusion in proposals

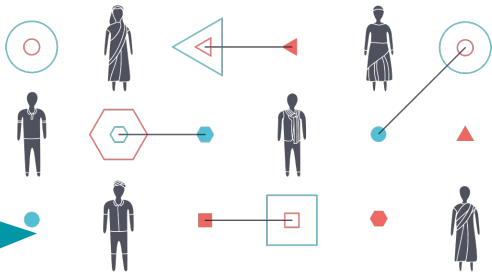


How are we taking “PEval” to the next level?

Phase 2: JUNE 2022 - JUNE 2023

DESIGN TO CONTEXT

Created a Community of Practice for MERL + GESI support



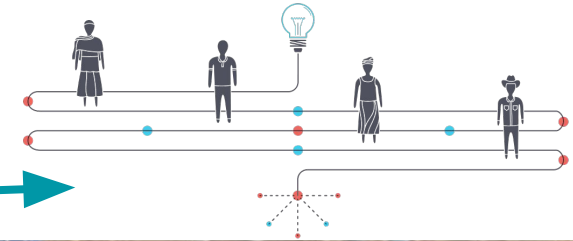
RESULTS RULE

Working on our first analysis of results, reporting, and sharing back to the community

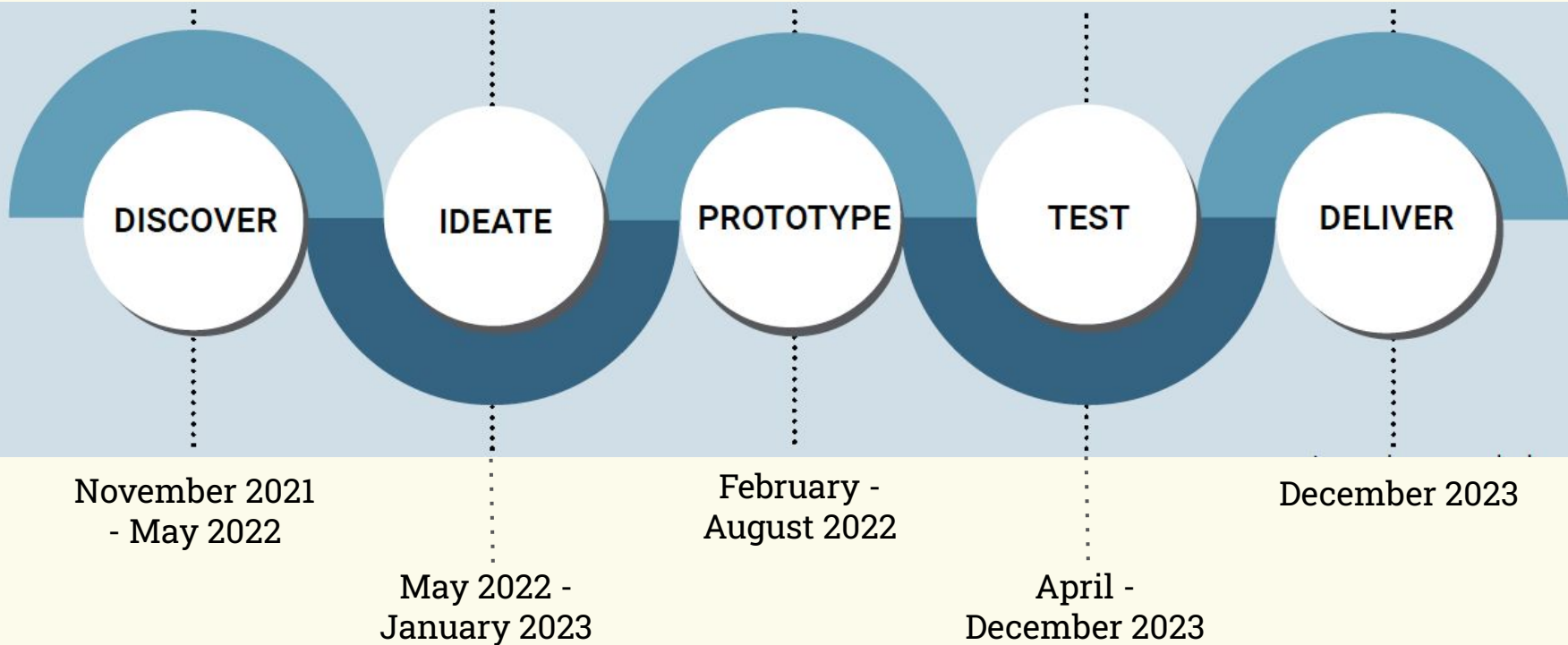


RESULTS RULE

Organizing a “pause & reflect” session with original Working Group and new organizers to evaluate our progress



How are we applying human-centered design to our process?



HEAR

CREATE

DELIVER



research

concept development
prototyping
testing

implementation

A wide-angle photograph of a sunset over a large body of water. The sun is low on the horizon, creating a bright orange and yellow glow that reflects on the water's surface. The sky is a mix of light blue and orange, with scattered white and grey clouds. A solid red horizontal banner is positioned across the middle of the image, containing the text '3. WHERE WE ARE IN THE HCD PROCESS' in a bold, dark grey, sans-serif font. The water in the foreground is calm, with a few small dark spots that could be birds or buoys.

3. WHERE WE ARE IN THE HCD PROCESS

And staff had identified challenges / concerns:

- [Skepticism] - how is this different than human-centered design?
- [Existing Practice] - How current tools/approaches are (or are not!) participatory
- [Money] - Financial constraints / budget restraints for time intensive activities
- [Time Investment] - intensive (both for iDE staff) and project stakeholders
- [Which stakeholders?] - How do you ensure you are including the appropriate stakeholders?
- [Skills] - Capacity limitations for staff

Challenges: stakeholders

How do you engage the stakeholders at an appropriate level and amount given the potentially large number of them? How do we know if we are including the right people? Each person, given their own priorities, will have their own priorities and levels which they engage that might conflict with yours. To mitigate this challenge, consider what is negotiable when involving stakeholders – most importantly, iDE should consider how to balance the potential power dynamics the stakeholders choose to engage

Challenges: cost

To do things in a participatory manner requires multiple touchpoints and rounds of interactions with stakeholders, which is more costly and timely. Cost and budget are the primary concerns for people mitigating this challenge is essential like using internal staff and coordinating schedules. One interviewee stressed that traditional and “rigorous” evaluations can sometimes be just as time intensive and costly, so how will iDE plan and prioritize for PEval?

Challenge: resource heavy

PEval is resource heavy to get done perfectly – meaning that resourcing might be the biggest implementation constraint. Low resources make PEval implementation within a timely manner difficult. This challenge is not just on an organizational level but also for stakeholders because the expectations around their involvement are greater. Since this specific challenge coincides with the others named by the interviewees, its resolution is dependent on how time, costs, and capacities are

Challenges: time, time, time

PEval is time consuming – you need time for finding the right stakeholders, translations, collecting data, sharing data, and more. Before the PEval process technically begins, time in the proposal and inception phase must be factored in. There are some processes that become particularly time consuming. All around, people and staff should be compensated for their time dedicated to PEval. An organized project and evaluation plan might help address the challenge of time

Challenges: capacity

Are there enough staff members at the individual and organizational level. Are individual staff members have the skills to do this type of work? In relation to the other things we systematically want to change with iDE, where does PEval fit in terms of priorities? It's important to consider personal and organizational capacity to implement a big endeavor like PEval. It is necessary to set structures and processes to support the transition into PEval, and in the future, potentially consider creating a PEval role to make this someone's primary

Challenge: ethics

Ethical challenges were centered on accountability and obligation. There is an implication that when you ask someone about a problem and engage with them in a participatory manner that you will do something about the problem. Is it ethical if you can't do anything about their problem, and are you morally obligated to do something about it? Additionally, there is a layer of uncertainty before PEval starts wherein input from stakeholders is still unknown. How will iDE continue to maintain credibility given these ethical concerns and do



So we used “How Might We” Questions to start the Ideate phase.....

- 1 Start with the problems (or insights!) you’ve uncovered
- 2 Avoid suggesting a solution in your question
- 3 Keep your HMWs broad
- 4 Use a positive frame to phrase your questions





So we strengthened collaborations

GESI

Design

**Project &
Sector Staff**


... and invested in a Learning Manager

**...and began our
Prototyping and Testing Phases!**



**How might we ... ensure
our staff know what
PEval is?**

Green = We did it!
Orange = Working on it!
Black = Revisit?

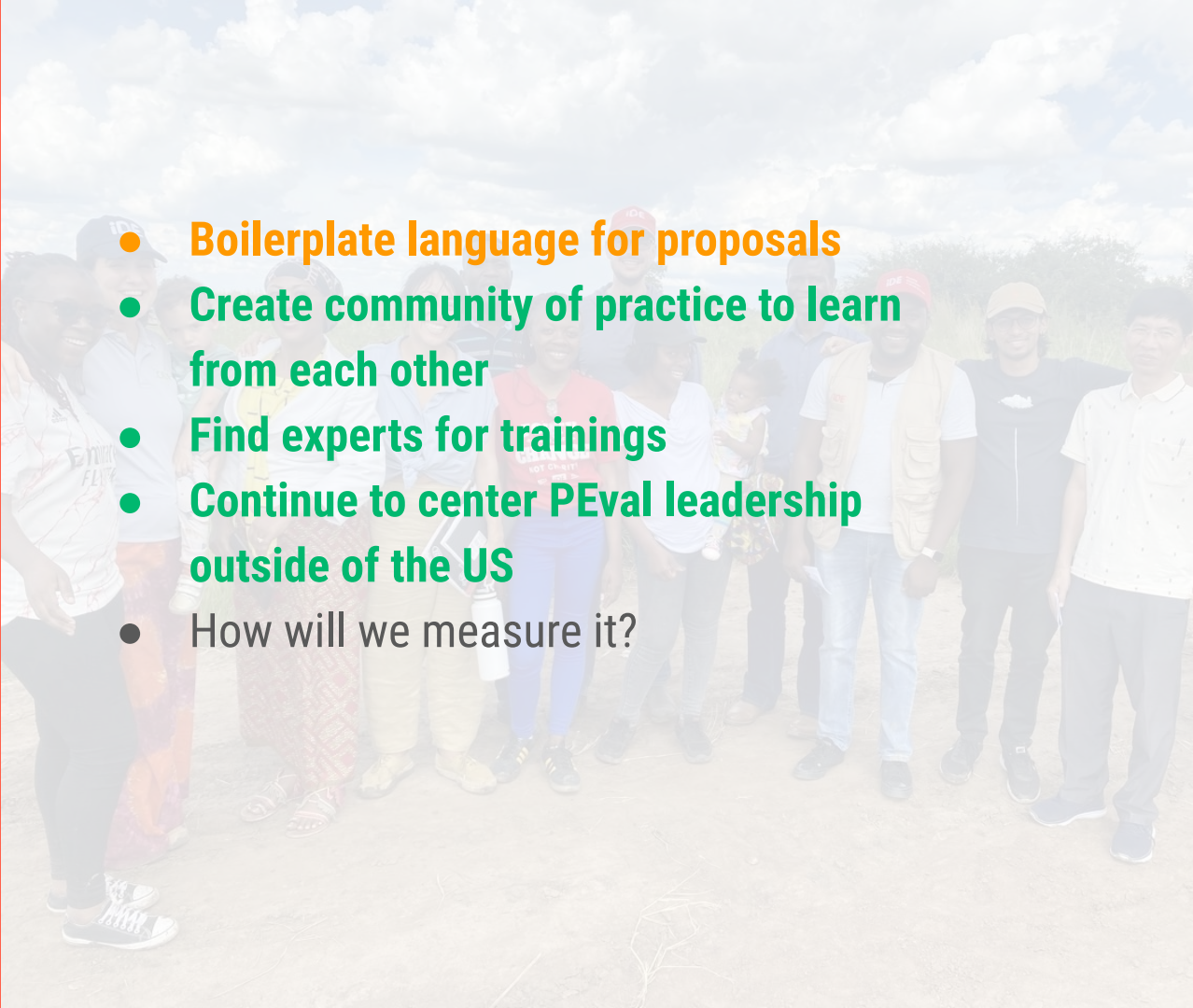
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- **Common definition**
 - **Compelling visuals**
 - Record videos
 - Case studies
 - **Build Intranet for all resources**
 - **Apprenticeship model**
 - **Trainings (virtual & IRL)**
 - **Provide incentives for staff to engage in PEval trainings**

How might we ... ensure our staff know what PEval is?

- **Common definition**
 - Working committee created a definition for PEval, revisited after first training
- **Build Intranet for all resources**
 - Event and Support Package intranets with resources from Inclusive MERL Summit on PEval and Most Significant Change (MSC)
- **Trainings (Virtual & In-Person)**
 - Denver training for global MERL and GESI reps, staff across roles in HQ
 - Inclusive MERL Summit training on MSC: “online to offline” course
 - MSC training in Spanish in Honduras

**How might we ... start
implementing PEval
within iDE?**

Green = We did it!
Orange = Working on it!
Black = Revisit?

- 
- **Boilerplate language for proposals**
 - **Create community of practice to learn from each other**
 - **Find experts for trainings**
 - **Continue to center PEval leadership outside of the US**
 - **How will we measure it?**

How might we ... start implementing PEval within iDE?

- **Create community of practice to learn from each other**
 - In early stage in Google Classroom
- **Find experts for trainings**
 - Identified expert trainer, Dr. Marina Apgar
- **Continue to center PEval leadership outside of US**
 - Community of Practice led by GESI Regional Officer in Zambia and MERL Director in Ghana with global participation
 - PEval working group with global participants
 - Though still heavy HQ involvement as we develop the method

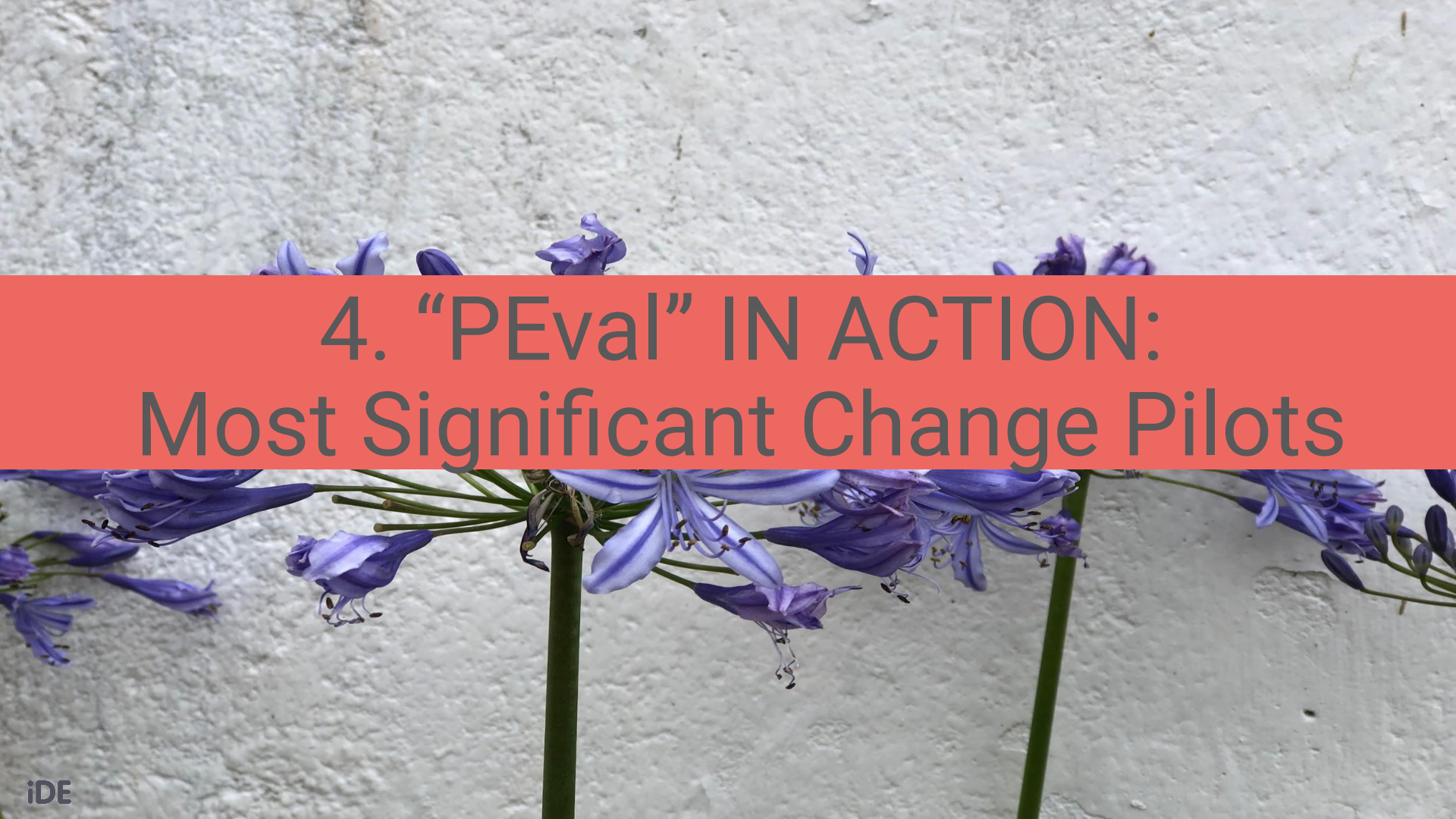
**How might we ... train
our staff meaningfully
on PEval?**

Green = We did it!
Orange = Working on it!
Black = Revisit?

- 
- **Coaching network**
 - **Multiple forms of training**
 - **Written and participatory**
 - **Step-by-step guides**
 - **Create professional development opportunity for our staff**
 - PEval certificate
 - **Many languages / translations**
 - Continuing education

How might we ... train our staff meaningfully on PEval?

- **Multiple forms of training**
 - Google Classroom
 - In person
- **Create professional development opportunity for our staff**
 - Intro to PEval Training for working group in Denver, USA, in Nov 2022
 - Inclusive MERL Summit in Lusaka, Zambia, in March 2023 with a focus on “Most Significant Change” (MSC) Method

A photograph of several purple flowers with long, slender petals and prominent stamens, set against a white, textured background. A horizontal red band is superimposed across the middle of the image, containing white text. The flowers are arranged in a cluster, with some in the foreground and others slightly behind.

4. “PEval” IN ACTION: Most Significant Change Pilots

Three MSC Pilots

**Training
Practice**

**“Her Time to
Grow”:
Multi-country
Female
Entrepreneur
Ag project**

**“Moonshot”:
Validating
iDE’s New
Strategic Goal**

Training Practice

- Conducted another round of Training of Trainers with all the MERL leads for each of our country programs (Spanish-language training in Honduras later followed)
- Discussed key concepts of participatory approaches in M&E such as Power, Systems Thinking, Adaptive Management, etc
- Workshopped a prompt and informed consent for Most Significant Change
- Pre-tested prompt with a select few women in Zambia



HTTG

- Revised prompt developed during the Inclusive MERL Summit to roll out in the three countries where HTTG is implemented
- The Ethiopia and Ghana teams cascaded the MSC training for their project staff
- Developed plans for story collection and selection with this instance serving as a baseline
- Selection committees identified through continuous discussion to reach participation objectives
- Selected stories and process being documented to inform the quantitative baseline



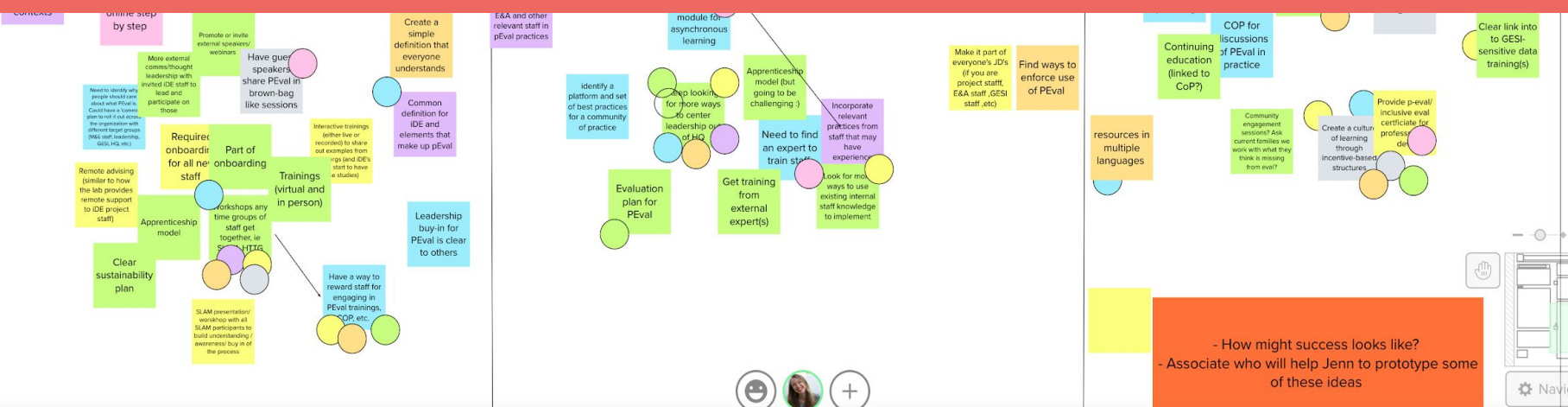
Moonshot MSC

- Built on the informed consent, guiding questions and other resources kicked off at the Inclusive MERL Summit
- GESI staff assisted to identify 'inclusive' population to build the sample
- Piloting in nine countries to understand what it means for our clients to 'thrive' and do so 'on their own terms'
- Goal: to incorporate client focus into iDE's new strategic goal





5. Q&A





iDE Powering
entrepreneurs
to end poverty.

Thank you!

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