IDEAS Guide

Innovating, Designing, Evaluating and Applying to Small-scale projects: a guide for media and communication projects

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Preface

As we were seeking feedback from media and communication practitioners, we met with Faumuina Felolini Maria Tafuna'i who was working with Women in Business Development (WIBD) in Samoa. Faumuina recounted a discussion with a funding organisation who was frustrated with progress on one of their projects. The funder told the team that their organisation needed to remember that doing a project was like driving a car – you need to stay on the road and try not to drive off the road. Over the course of their discussion the WIBD team explained that rather than driving, carrying out an innovative project was more like sailing a *waka hourua*, a Pacific-style sailing canoe. As Faumuina described, 'You can't always sail in a straight line to get to your island destination; often you have to sail different tacks to get there'. She then added, 'There's a saying: you can't change the way the wind is blowing, but you can change the way your canoe is facing'.

The idea of a small grants project as a process of sailing brilliantly captured the possibilities and challenges of doing innovation projects. It also inspired our thinking about the ways we approach learning and innovation in the *IDEAS Guide*.

It is our hope that the I*DEAS Guide* can be one of the tools that you can use to help navigate your way as you sail your own path through innovation and learning. You will need to be well-prepared and plan your course. It requires knowing who is travelling with you and communicating well with everyone onboard. Once you set sail, you will need to watch for unexpected things like islands, or coral reefs, which might be obstacles you'll need to sail around. It is also important to be aware of the conditions around you, such as the wind, currents and tides, so that you and your organisation can decide when to change tack.

The *IDEAS Guide* is a resource to develop your evaluation plans before you begin a new project, so that during the journey you have a strategy and tools to help you watch and listen to the changing situation around you. It can help you to determine the important questions to ask, the different ways to answer your questions, and the skills needed to intepret the information. Incorporating evaluation and learning into your project journey from the beginning means you will be able to adapt your project to the changing tides, so that you can keep turning your canoe in the direction of your island.

This idea of evaluation may be new to you. Usually people think evaluation is something you do at the end of a project, and for the benefit of funders. But evaluation that is linked to the design of a project can be valuable for organisations and practitioners to better understand what is working, and what is not, and why. It provides evidence that your organisation can use to adapt projects, and to make stronger cases to funders about the value of investing in small grants projects. Collecting good information and listening to the people you are working with at all stages of a project means that you can learn from innovation projects, and that you can continue to improve and grow.

We hope that this guide helps you to navigate your path. We wish you all the best on your journey.

Acknowledgements

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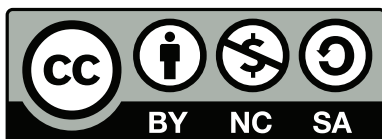>
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Introduction to the *IDEAS Guide*

What is this guide for?

The *IDEAS Guide* is for organisations and people who are doing small media and communication projects. It is designed to cater for a range of different skill levels in evaluation. It is ideal for project managers and team members responsible for reporting and evaluation, as well as any other participants who are interested in evaluation. The *IDEAS Guide* leads you through the process of designing a project, and thinking about the project's evaluation. The guide is focused on how to do useful evaluation for learning and continual project improvement. To achieve this, it is important to think about the evaluation of the project as you design it, and to learn from evaluation during the implementation of the project. Focusing on what you can learn by carrying out a project is especially important when the project idea is new and innovative.

Why was it developed?

The *IDEAS Guide* was developed in the context of the Pacific Media Assistance Scheme (PACMAS) Innovation Fund program. The Innovation Fund offers small grants for new and innovative media and communication projects to people and groups located across the Pacific region. PACMAS encourages applications from people and organisations with little or no experience of developing projects as a way to foster grassroots participation and innovation.

Innovation funding is exciting and full of potential; however, it requires a commitment to capacity-development for project teams as part of the overall program. It also requires design and evaluation tools that are realistic for small-scale projects, sensitive to culture, and easy to understand and use.

Most examples are drawn from projects in the Pacific. Not all of the examples mentioned in this *IDEAS Guide* were funded under the PACMAS Innovation Fund.

How should you use this guide?

The *IDEAS Guide* has been developed with the idea that a funding organisation could play an active role in helping project teams to use the guide. This facilitation role is important to help talk through the evaluation options, and how to adapt the activities to the project (a handbook called the *Facilitators' Guide* is available). However, it is also possible to use the guide independently.

Each module includes an explanation of the module, some guided steps and some discussion questions for the project team. Often there are links to websites and other resources if you need further information.

Structure of the guide

The *IDEAS Guide* is divided into ten modules.[1] Although these activities are designed to build upon each other, you may wish to adapt the order to suit your organisation's purposes. The modules also refer to the seven important principles of evaluation in development projects[2] (figure 1).
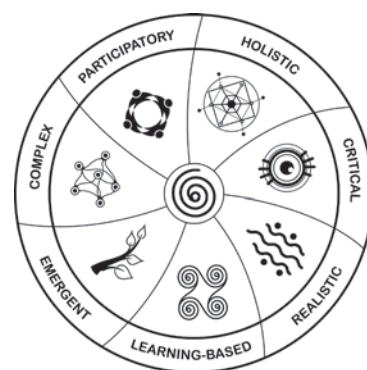

Figure 1. The principles of evaluation.

1. The modules draw upon the Rainbow Framework. To learn more see BetterEvaluation.org.
2. The principles of evaluation are presented in *Evaluating Communication for Development* by June Lennie & Jo Tacchi (2013).

Module	Objectives and activities
Introduction to the *IDEAS Guide*	An introduction to the guide and how it can be used for designing, evaluating and learning about small-scale communication projects.
PART 1	
Module 1: Understanding the role of evaluation and learning in innovation	Framing evaluation as continual learning. Evaluation can help you to listen and learn about what's working, so you can share these insights and lessons with communities, organisations and funders.
Module 2: Defining your project goals and priorities	What are you trying to do? How are you trying to do it?
Module 3: Understanding the people connected to the project (stakeholders)	Who has an interest or role in your project design and evaluation? We map out who the stakeholders are in your project.
Module 4: Stakeholder participation and communication	How can you best communicate and engage with the different stakeholders in your project?
Module 5: Doing the right thing by the people involved with the project (ethics)	What are the ethical issues in media and communication projects and evaluation? How can we prevent these from becoming problems?
PART 2	
Module 6: Planning data-use	What is your overall timeline for sharing your findings and insights? How can you build-in continual learning? What are the most appropriate ways to share your insights?
Module 7: Asking the right questions	Based on your main goals, what are the key evaluation questions?
Module 8: Planning information and data collection	Which data collection methods will give you the best information to answer your questions? Which methods are realistic? What is the role of ethics in data collection?
Module 9: Making sense of data	Now that you have collected the data, how can you analyse it to find patterns and trends?
Module 10: Reporting and sharing	Tips on presenting and reporting on your data, including non-traditional and visual methods.

Table 1. Structure of the *IDEAS Guide.*

PART 1

Beginning a media and communication project is a bit like embarking on a new journey in a *waka hourua*, a Pacific-style sailing canoe. But before you set sail, it is important to develop a clear picture of the design of your project so that you are clear about the island you are trying to get to, and the most likely route to get you there. You'll also need to identify your crew members and assess the dangers. It might not always be smooth sailing, but by working through the activities in part 1 of the *IDEAS Guide* you will be in the best possible position to achieve your goals.

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

Learning outcomes

At the end of this module you will be able to:

- understand what evaluation is, and its potential as a continual learning process;
- identify the ways in which your organisation or project already does evaluation;
- identify the level of learning and innovation you will need to reach your project goals, and what this means for how you begin your journey.

When starting a new journey in the ocean, it is important to constantly track your progress against maps, compasses, and your knowledge of the tides and the stars to make sure that you are heading in the right direction, and to be able to steer the course around potential dangers. Continual learning is important to ensure that you reach your destination. For that you need to understand the type of journey you are undertaking, so that you know what you will need to learn and discover along the way.

This module includes three activities to help you identify how intensely you will need to be learning and adapting along the way (which depends on how much you already know about the project), and understand more about evaluation and how to it relates to what you already do.

Understanding which type of course you are travelling

Different types of projects need different types of evaluation and learning. There are four different kinds of learning journeys that you might be taking in your project or program:

- finding a project idea (finding a destination);
- doing a project that has been proven to work (a well-known route);
- adapting a project that has worked before (an unexplored route); and
- creating a completely new and innovative project (a new route).

Activity 1

Where are we? Discuss in groups the kind of learning path you are on. Draw an X to show where you are along the line.

Finding a destination

You are keen to do a project but you are unsure what the community needs, or how to design a project that meets these needs.

Travelling a well-known route

You are repeating a project or program that you have done before, or that someone else has done before. You have lots of evidence that the project model works. The project model is perfect and cannot be improved. You just need to follow the same basic path.

Travelling an unexplored route

You are using an idea or model that has been used somewhere else and you want to try and adapt it to your context. You are not sure if this project will work because you have never done it before, but you know where to start.

Travelling a new route

You are creating a completely new idea for your project. You have a goal in mind, but there is no path and no map, and many potential options.
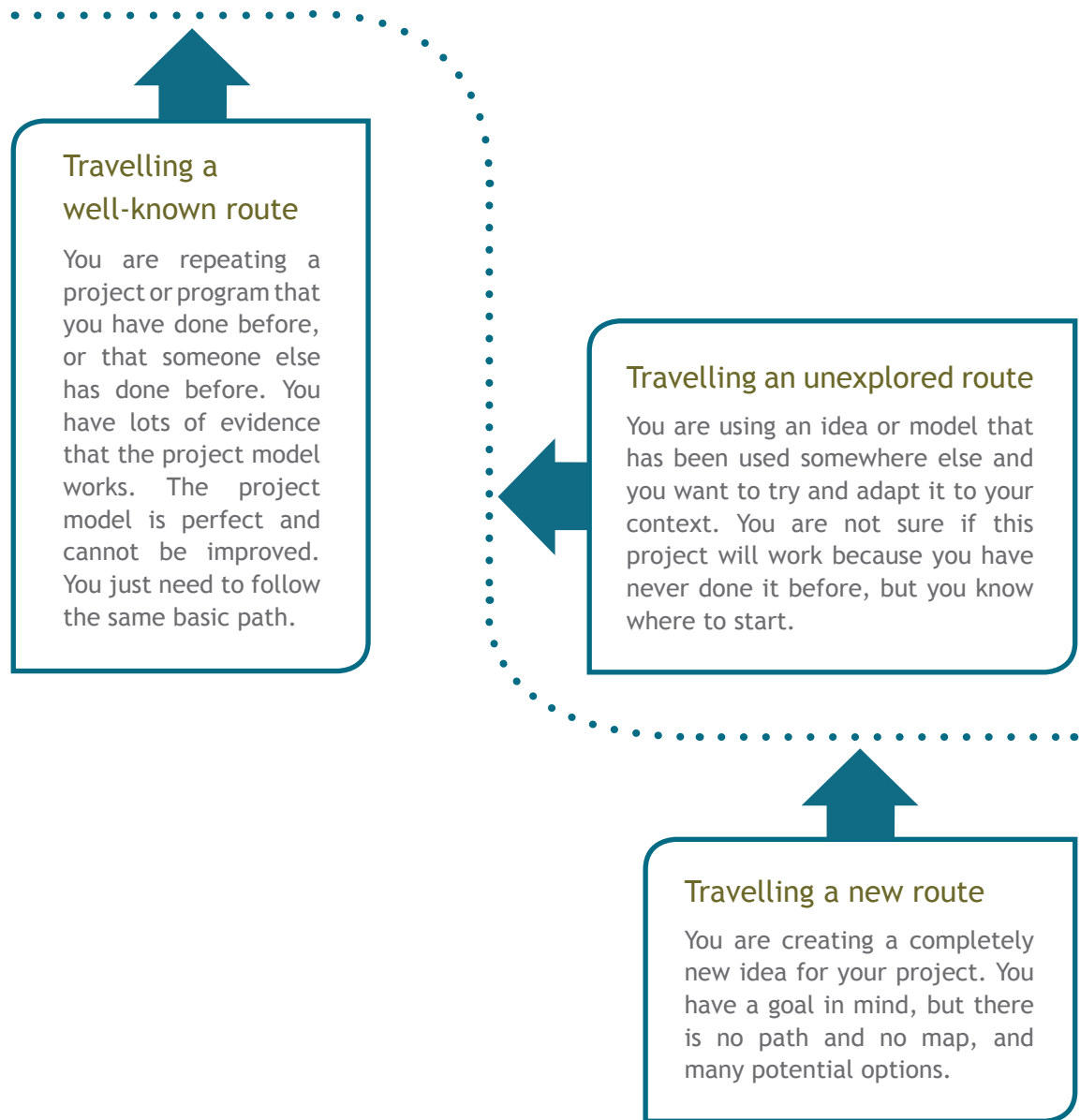
Figure 2. Finding your learning journey.

Considering the type of evaluation that matches your learning pathways

Different pathways call for different styles of evaluation and different questions that you will need to ask.

Activity 2

Using Activity 1 as a guide, look at the table below and consider which course of action and questions might suit the learning pathway that you are on. Write down your main learning questions on a separate piece of paper.

Finding the route to travel[3]	Travelling the well-known route	Travelling an unexplored route	Travelling a new route
Wait	Track and monitor	Test and learn	Intensive testing and innovation
Before moving ahead, you will need to consult with the community and ask, 'What is needed?'. When you have a project, you can return here to find the right path to take, and then continue on through the guide.	Since you know the path works, your main task is to continually check that everyone stays on track and that processes are being followed correctly. The main focus of your evaluation plan will be monitoring and tracking to make sure things are still going well (see module 8). Unexpected events can still happen on this path, and there may be a need for innovation and a change of plans in response to your data.	You will need to test your idea in the field, and look at processes and impacts to assess what's working, and what's not working as expected.	Because your project is in an experimental or pilot phase, you need to carefully document processes, and give your organisation time to reflect on achievements and challenges. This resembles sailing in that you may need to change tack or direction.

Useful learning questions for your path

	How is it going? You will need to set targets and track progress against your goals.	What results have been produced and for who? What has (or has not) worked?	How is it going? What has (or has not) worked? How could you improve?

Table 2. Evaluation styles and questions for different learning journeys.

3. This section has been adapted from *Program Evaluation: Forms and Approaches* by John Owen and Patricia Rogers (1999), and from *Overview of Impact Evaluation* by Patricia Rogers (2014), available at http://devinfolive.info/impact_evaluation/ie/img/downloads/Overview_ENG.pdf

What is evaluation and why invest time and resources in learning about it?

People have lots of different ideas about evaluation. The *IDEAS Guide* is based on an idea of evaluation that encourages continual learning for all people and groups connected to the project. The table below compares the evaluation approach suggested in this guide with common thinking about evaluation.

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

Table 3. Different approaches to evaluation.

Building learning into your organisation's routines will mean that project design is more responsive to community needs. It will help your organisation to document and communicate success, and to adapt when programs and projects are not working. You will be able to share what you learn with other staff so that you can keep track of what does and does not work, even when someone in your organisation leaves or when new staff join. This helps to avoid making the same mistakes in other projects. You will also find that writing your final reports will be much easier. Although you may not feel confident now, by using this guide you will be able to develop your own evaluation plan and strategies to implement it.

Activity 3

Working in your groups, discuss the questions below:

• Reading through table 3 on page 12, how does this compare to your own ideas and experiences of evaluation?

• What kinds of learning and evaluation activities do you already do? Have you ever thought about these activities as 'evaluation'?

Questions for discussion and reflection

1. What is most useful or surprising about thinking about learning and evaluation in this way?

2. How does the idea of sailing relate to your project? What other metaphors have you used to visualise and explain your project and approach?

Keep your discussion notes as they will be useful in future modules. Key questions will be developed further in module 7.

Module 2: Defining your project goals and priorities

Learning outcomes

At the end of this module you will be able to:

- state the goal of your program and project, and how you are working towards change;

- decide which aspects of your program and project are most important, and which require the most effort and focus in evaluation;

- state your goals for each part of your project.

Where are you planning to sail? Now that you know the type of route that you are sailing, it's time to think about the destination and how you plan to get there.

This module includes a series of steps and tools to help you identify what you are trying to do, and how you are trying to do it. Where possible, this is best completed as a group activity with some or all of your project team.

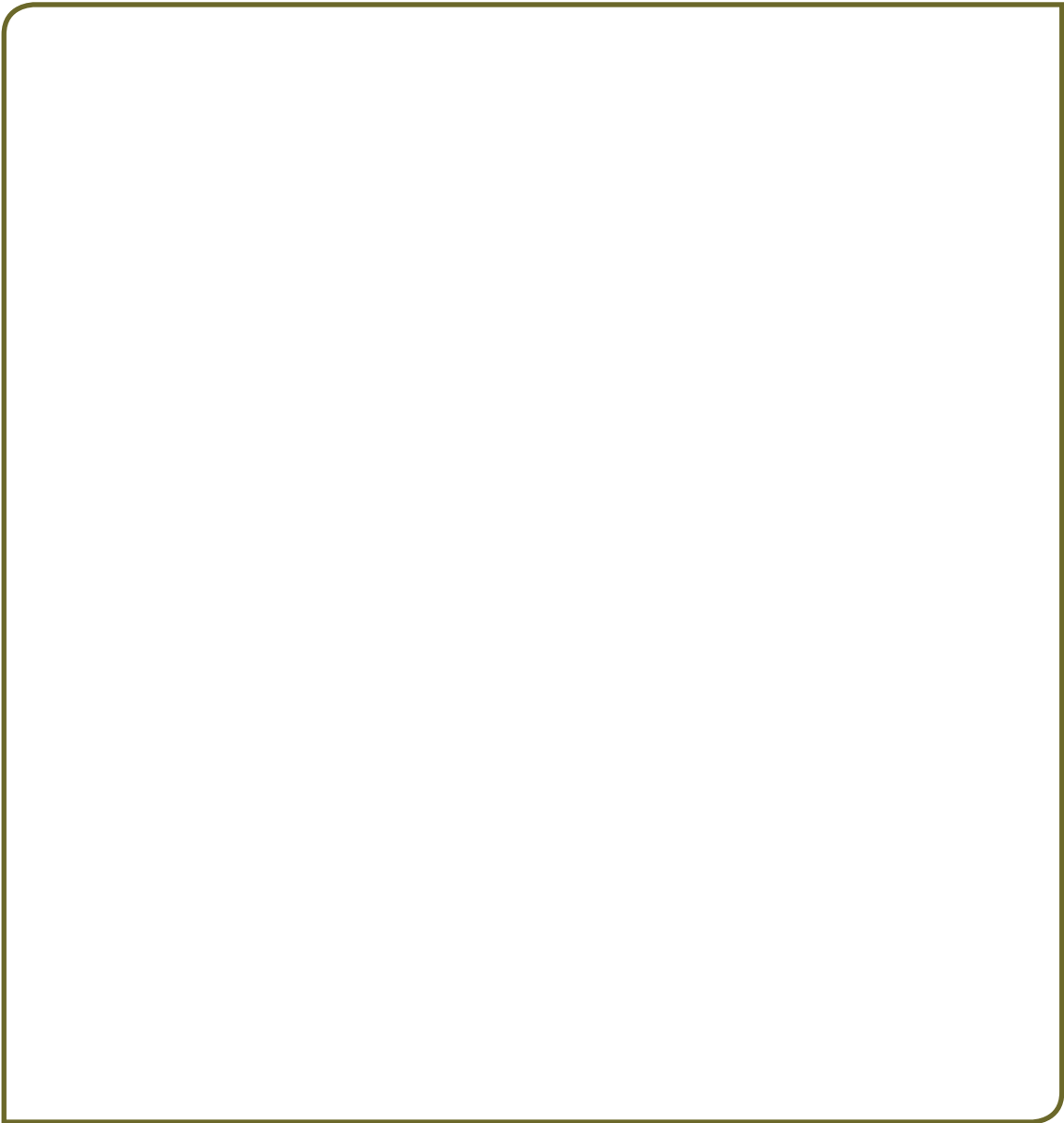## What are you trying to do?

Activity 1

A good place to start is to think about the change that you are trying to create. All projects have some kind of change that they would like to make, whether it is to assist certain community groups to have their voices heard, to affect a change in policy or awareness of a broader issue like climate change, or the creation of a new outlet for communication and expression, such as a radio station or website.

Start by thinking about the current situation. What is the problem you are trying to solve? Now try to imagine the future. If your project is successful, how will the future be different from the present? You might like to write a story or use other creative methods to describe what success for your project means. You can use the space on the next page, or your notebook if you prefer.

Holistic:

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

How are you trying to do it?

There are four basic approaches that describe how most media and communication projects try to create change.[4] These are:

- creating content (messages, stories, information);

- enabling people and communities to have a voice and engage in dialogue;

- building the capacity of media and communication practitioners; and

- improving infrastructure, equipment and systems of communication.

Sometimes, a combination of these four is included as components.

4. These components are informed by Manyozo's (2012) *Media, Communication and Development: Three Approaches*, and Noske-Turner's (2014) thesis *Navigating theory, negotiating difference and beating the system: a critical how-to of media assistance evaluation*.

Activity 2

This tool is designed to help you visualise how you are trying to achieve your goals. This activity aims to help your team to identify, visualise and compare the significance of different approaches in your project.

1. Sorting and comparing project approaches using objects

    Collect 15-20 small and similar objects like rocks, seeds, buttons, pencils or lids. As a group, arrange these objects on the boxes below, using the number of objects in each box to represent the level of significance for your project. You may choose to place all objects in one box, or split the objects across two, three or all four of the boxes.

Content

Creating and sharing messages, stories, information or ideas in forms such as film, radio, posters, websites, mobile content and theatre.

Voice and dialogue

Discussion and two-way communication enabling participants to have a voice, identify local problems and solutions, and take part in decision-making and community-action processes.

Capacity-building

Teaching, mentoring, or other ways of learning or improving new media and communication skills is part of the project.

Infrastructure and systems

Building or improving infrastructure or equipment. Building support networks or improving systems through new media and communication policies or laws.

2. Ranking project approaches

   Based on the decisions you made in step 1, cut out the boxes below and rank them in order of importance in the table on page 19. In the 'N' column, write the number of objects you placed in that box from step 1. See figure 4 on page 21 for an example of a ranking activity.

Content

Creating and sharing messages, stories, information or ideas in forms such as film, radio, posters, websites, mobile content and theatre.

Voice and dialogue

Discussion and two-way communication enabling participants to have a voice, identify local problems and solutions, and take part in decision-making and community-action processes.

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Building or improving infrastructure or equipment. Building support networks or improving systems through new media and communication policies or laws.

Ranking	N	Goal statement
Most important		
Least important, least relevant or irrelevant		

Table 4. Ranking project approaches.

3. Goal statements

Now that you have identified and ranked the key components of your project, the next step is to clarify what you are trying to do within these different areas. Next to these categories, discuss and write your goal statement for each in the column provided. There are some examples of statements for you to adapt, and a case example, on the next page.

Identifying your project goals: An example

Project name: Capital FM107 Outside Broadcasting

Goals: To improve radio programs by introducing high quality outside broadcasts through the internet, data links, or mobile/wired telephone connections from places all over Vanuatu and even overseas.

Figure 3. Capital FM 107 Sports Reporter James Walau during a live soccer broadcast from North Efate. Photo by Hendrik Kettner, courtesy of Capital FM107 and PACMAS.

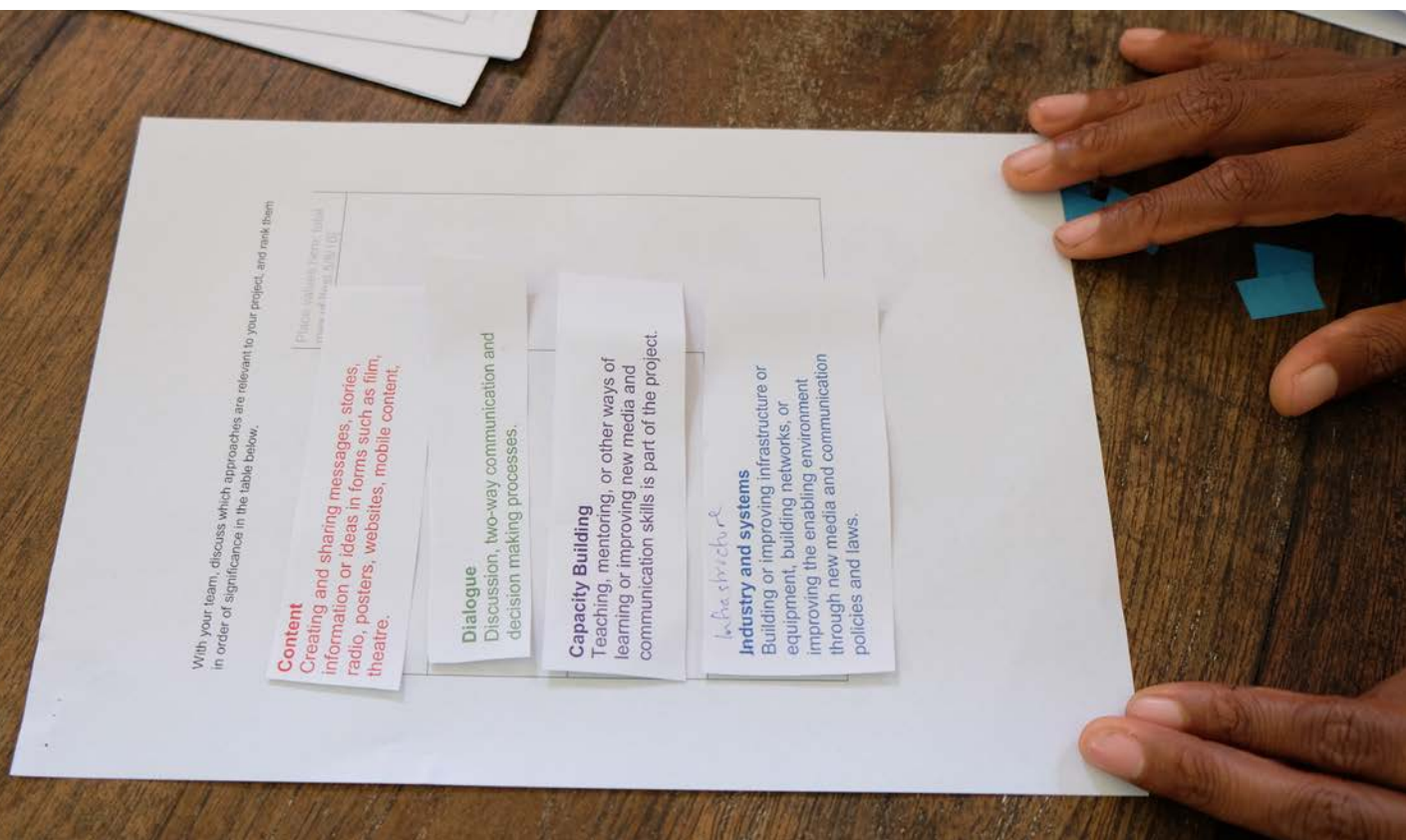| Ranking	Goal statement
Infrastructure and systems	Buy and install technical equipment.
Capacity-building	Train people so they know how to use the equipment.

Figure 4. An example of a ranking activity.

Questions for discussion and reflection

1. Did you have any difficulty in ranking the different aspects of your project?

2. Are your goals interrelated, or do they have different levels of importance at different stages of your project?

Keep your goal statements as they will be useful for refining your evaluation questions in module 7.

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

> ### Learning outcomes
>
> At the end of this module you will be able to:
> - identify and map all the different stakeholders involved in your project;
> - consider which stakeholders might be critical of, interested in, aware of or disruptive to your goals.

Now that you know where you are going, and how you will get there, and understand the type of journey, it's time to think about the people who are interested in and connected to your journey. These people are your 'stakeholders'.

Stakeholders are people or organisations who are in some way involved in the project. These may be people who can help to create change, or who may be affected by the changes your project is trying to make. You may depend upon the active participation of these people for your project to successfully bring about the changes you want to create. For this reason, identifying your stakeholders and thinking about how you can do your best to involve them is very important.

Stakeholder Mapping

Activity[5]

Stakeholder mapping can help you to identify stakeholders, and their interests in the project and its evaluation. We'll refer back to this map in later modules to consider the project design and evaluation from different perspectives.

1. Work together with other members of your team to write the name of each of your stakeholders (people, groups or organisations who are involved in your project or program) on sticky notes (one stakeholder per sticky note).

   Your stakeholders could include specific communities, village chiefs, specific people or groups within communities, volunteers, funders, employees of organisations, project staff, senior leadership, 'experts', government officials or others. It can also include your own organisation.

2. Arrange the sticky notes of your stakeholders into categories. Then think about if there any other ways you can group or categorise your stakeholders. If you have a mobile phone or camera with you, you can take a photo of these different arrangements, and make a note about what you have discussed.

3. Write the name of your project in the middle of a large piece of paper. Arrange the stakeholders around the project name, moving the stakeholders most connected to the project close to the middle, and those most distant further away.

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5. This activity is based on *Stakeholder Assessment, Tool 2* by Charles Lusthaus, Marie-Hélène Adrien, Gary Anderson, and Fred Carden (1999), p. 86. See http://betterevaluation.org/evaluation-options/mapping_stakeholders.

Figure 5. Identifying interests on a stakeholder map.

4. Using your stakeholder map, indicate each stakeholder's interest in the project; that is, how the stakeholder might benefit from the project. Each stakeholder may have several interests, as listed below.

Stakeholders may:

- have a critical role in making the project a success;
- be interested in the project;
- know about the project but not be committed to it; or
- have a vested interest in disrupting the project (for example, competitors).

You may wish to use a shorthand for this activity:

C = Critical role

I = Interested

K = Know about

D = Disrupting

Figure 6. Discussing a stakeholder map.

Questions for discussion and reflection

1. Is this the first time you have mapped stakeholders in this way for your projects?

2. In what other ways do you think about and involve different organisations and individuals in your project design, delivery and evaluation?

Keep your stakeholder map as it will be used in modules 4, 5 and 6.

Module 4: Stakeholder participation and communication

Learning outcomes

At the end of this module you will be able to:

- consider different kinds of participation from different stakeholders;
- identify, discuss and plan some ways in which your organisation or project can communicate with each stakeholder;
- review if participation from stakeholders might need to change.

Now you need to take a closer look at your crew members and advisors, and think about how you will communicate with them during the planning and on journey. A combination of skills and knowledge, and good communication to share different types of knowledge, are vital to keep your canoe afloat and heading in the right direction.

Effective communication with all stakeholders is a vital element of a participatory approach. It will also increase your learning and contribute to the success of your project. Communication is not just about sending information, it also means creating opportunities for speaking and listening, for all of your stakeholder groups.

Participatory:

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

Engaging different kinds of expertise

Your stakeholders all bring different kinds of expertise to the project. Local stakeholders, such as community organisations, often have knowledge of what is happening on the ground and can advise on the best ways to implement a project.

People from international organisations may have developed programs that have worked in other places in the region, or may be able to provide technical advice or training not available in your region or country. Different stakeholders will bring different contributions and can influence the project design, implementation and evaluation in different ways.

Technical expertise → Knowledge needed for the project ← Local expertise

Figure 7. Knowledge needed for project success.

Incorporating ideas and expertise from a range of stakeholders: An example

A team implementing a media capacity-building project in Vanuatu received some negative feedback about a recent training event. The team started discussing how the level of participation by different stakeholders in planning and decision-making had led to some of the problems identified in the feedback.

Figure 8. Youth participants.

By looking at their stakeholder map, the team realised that their project design and implementation was all based on technical expertise from people and organisations outside of the community. They saw that:

- the idea for the training had come from a large International NGO (INGO);

- the INGO organised the trainer, who had specific expertise on the topic; and

- they were using an existing training package that had been originally written for use in a different country.

Because the training was on a technical topic and it was new to Vanuatu, it was helpful to bring in external, technical expertise. But there were some problems with this too. The team discussed the following issues:

- 'We need more time [for the] regime of the training to be suitable for us.'

- 'There's so many big words … The community-level youth, some of them really need to ask me for more [help] so … I started helping them.'

- 'When the training they attend is not relevant to what their objectives and aims are … they will just say – "no, we'll just relax for the day. We don't get anything."'

Incorporating different kinds of expertise

The team discussed how they might include more local ideas and expertise in future projects. Here are some of the ideas they talked about:

Maybe the next time if they [INGO] want to come and run something with the young people here – it's best to get the idea from [the young people]. Like, what exactly do you want to produce out of the training? Is it going to be helpful for the community? Or the people from the rural areas?

From this example we can see some great options for making capacity-building projects more locally relevant. Here are some other ideas you could consider if you would like to make other aspects of your project more inclusive of local participants:

Content

- Asking communities what they want the content to be about.
- Including participants in processes for making content, such as letting them use the camera.
- Showing stakeholders drafts of the content so that they can give feedback.

Voice and Dialogue

- Inviting communities to decide the agenda for dialogue activities.
- Inviting communities and community leaders to lead dialogue activities.

Capacity-building

- Asking participants what kind of training they want.
- Asking participants which kinds of experts they would like to help them.
- Adapting your training to suit the participants.

Infrastructure and systems

- Asking the 'users' of a system what their needs are, and how they would like the system to work.
- Holding round-table meetings to discuss media and communication policy needs.

The activity on page 28 will help you to think about the kinds of knowledge and expertise you might need to plan and design your project.

Culture and customs

There are very different protocols and customs that are used to show respect across different cultures. It is important to know about and be sensitive to these customs when considering how to best communicate with people. For example, when creating the stakeholder map shown in figure 5 (module 3), a project team recognised that to be successful they needed to communicate with government officials (by hand-delivered letter) and village chiefs (in a face-to-face meeting), to get approval to carry out the project before talking to the rest of the community. It is a good idea to plan enough time to meet with community leaders and other stakeholders to discuss what you are doing. It is also important to listen to what their vision is for the community and what their views are on the project. This will make the project much easier, more successful, and more sustainable in the longer term.

Thinking about your engagement, communication and balance of expertise

Activity

To explore the best way to engage with your different stakeholders, you will need to use your stakeholder map from module 3. Use your stakeholder map to work through the steps below.

1. Draw a thick line between the project and the stakeholders with whom you regularly communicate and have a strong engagement. Draw a thin line where the engagement is weaker and where you communicate less often and less openly. Levels of communication needed or desired by each stakeholder will vary according to their levels of engagement in and influence on the project.

Effective, culturally-appropriate communication: An example

A Samoan-based organisation developed three approaches to help improve communication and mutual understanding with a donor. Some friction had built up over time, and both sides needed a way to resolve frustrations and move forward. They used three Samoan concepts to promote effective communication. The concepts were:

*   *Talanoa* ('open dialogue'), which in the context of the project simply meant 'business as usual'.

*   *Avanoa* ('opportunity'), which was used by both parties to signal an introduction to a new person or idea, to request a Skype call or to alert one another to a new opportunity.

*   *Teu le va* (*teu* meaning 'clean' and *va* meaning 'space between/relationship space'), which signalled that a problem needed to be resolved or that an apology needed to be made.

If, for example, an email was sent with '*Teu le va*' in the subject line, the receiver could be better prepared for hearing information about a problem. In addition, the concept carries with it an emphasis on respect and rebuilding, which is very important in Samoan and Pacific Islander culture. By sharing these concepts, the two parties were able to better understand and communicate with each other.

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2. Now identify how you will encourage participation, and how you will communicate with each of your stakeholders. This may change throughout the project. Think about:

    •   How do the project stakeholders participate? How could they participate more?

    •   What are the values, customs and protocols that you need to respect in order to engage with the community?

    •   What are the best ways to communicate (such as Skype, email, phone, meetings or face-to-face)?

    •   What are the potential barriers to continual two-way communication?

    •   What are the most effective and appropriate ways to share results with different stakeholder groups? Also see module 10 for more ideas.

3. Next, try to identify:

    •   Which stakeholders bring local knowledge and expertise, and which bring other kinds of expertise. Which kinds of stakeholders influence decision-making and planning?

    •   Do you have a good balance of different kinds of expertise? Could your project benefit from increasing the participation of stakeholders with other kinds of expertise?

Questions for discussion and reflection

1. What opportunities do you have to share your ideas with key stakeholders, to hear about their ideas, and to make sure that your plans also suit them and their desires for the project?

2. If you identified that you need to engage more with some of your stakeholders and involve them in decisions about your project, what activities can you organise to do this? See the example on 'Incorporating ideas and expertise from a range of stakeholders' (page 26) for more.

Keep records of your ideas from this module; they will be useful in module 7 when you think about evaluation questions. You might need specific questions to help you understand how well you have been able to include different stakeholders who have different kinds of expertise.

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

Learning outcomes

At the end of this module you will be able to:

- talk through some of the common ethical risks in media and communications, such as privacy, representation and working with children;

- consider what the ethical risks are in your project;

- identify some strategies to prevent or reduce the risks.

Are there dangers like reefs, or sharks or sea-sickness, that you need to be aware of and try to avoid? Your stakeholders have a right to know about these concerns. It is your responsibility to both plan well and avoid dangers, as well as to communicate clearly about any unavoidable risks.

This module is about making sure that your project is ethical. This means that you do everything you can to make sure people won't be negatively affected by your project. The module will help you to think about potential risks in media and communication projects, and how these risks can be avoided or managed.

'Informed consent' means giving people all the information they need to make the decision about whether or not they will be involved. Giving people this opportunity is a core part of being ethical. People may give their consent (agreement to participate) verbally (sometimes recorded by audio or video), or in written form (a consent form). The discussions you had in the previous module should help you to decide the best way to give information and agree on participation with stakeholders, taking into account custom and respect.

Risks in media and communication projects and their evaluation

In media and communication projects there are different kinds of risks, and not all can be solved with a consent form. This module will explore some of the common ethical issues in media and communication projects.

How people are presented to others ('representation')

Although people may have agreed to participate in a media project at the beginning of the project, they may not be comfortable being included in the final photographs, video or report. It is the person's right to decide if their image will be included. It is good practice to show the final content (film, training manual, etc.) to the community, and to make sure that they get a copy of the final product. If possible, you could show a draft to the participants and communities and ask if they are comfortable with it, and whether anything should be changed. This is especially important if you have been working in partnership with communities.

Some questions to consider include:

- What will you do with people's images and information?

- After you share the information or images, could others have negative opinions about that person or group? Should you hide their identity?

- Are you reinforcing stereotypes, such as 'happy island children' or 'poor, uneducated people'?

- Are you asking for consent from the right people?

Children and young people

Children and young people require special consideration in your projects, as they place their trust in the adults around them to make decisions that are in their best interests. When involving children and young people in your projects, consider the following questions:

- Does the parent or guardian know about the project and give their permission?

- Does the child want to participate in the project?

- Can a parent participate with the child?

- Have you made sure that children and young people are being looked after by a responsible adult, and will not be emotionally or physically harmed while participating and during the presentation of your project?

Protecting privacy

If you collect personal information about people, those people need to know what information will be shared, and who it will be shared with. Questions to consider include:

- Are you planning to collect or share information about people that is personal or might not be common knowledge?

- Who will have access to this information and when?

- Will the information be stored safely and securely?

Harm and offence

Part of respecting the communities that we work with is taking into account community values and standards, and trying not to cause harm (for instance, by reminding someone of traumatic experiences or by putting people in uncomfortable positions). When creating your content, consider the following:

• Is your content is likely to cause harm or offence? If so, how can you minimise this?

• Are your participants vulnerable because of their past experiences, such as living through a difficult event, the loss of a family member or friend, the experience of violence, or for any other reasons?

• Is it absolutely necessary to include certain material or undertake particular processes to meet your project aims?

• Could participating in your project put your participants in uncomfortable or unsafe situations?

• Do your participants need special care, or access to counsellors or other services?

Checklist for explaining the project:

Many (but not all) risks can be prevented by fully explaining the project to participants (and to parents/guardians if working with children) and other stakeholders. Here are some important points to cover:

• What are you asking them to do?

• How much time are you asking for?

• What can they expect to happen after they participate? Will they be able to see what you do with their information?

• Could anything bad happen?

• Is it possible that nothing will happen?

Activity 1

The examples below are based on ethical issues in real projects. In your teams, read each example and then identify what the ethical issue is. Discuss what went wrong, how it could have been prevented and what should happen next.

A documentary filmmaker went into a community aiming to make a film to raise awareness about exclusion and a lack of rights. When the community saw the film, they were very upset that they looked like 'helpless victims', when actually they felt a sense of pride about their community despite the hardships they experienced.

An organisation held a community forum to discuss their experiences and concerns about climate change. The forum led to some proposals for solutions. Six months after the project ended the participants contacted the organisation to find out when the proposals would be put into action, but the project was finished and there was no budget left.

A man was asked if he would mind being filmed walking around his office for an advertisment. He agreed. Later, he found out that the video of him was used in an HIV/AIDS awareness advertisement showing that people with HIV are normal. His whole community saw it and believed that he had HIV.

What is the ethical issue? What went wrong or could go wrong? Could it be prevented? What should happen next?

An organisation was doing a video archive project with a community. The community participants had done the training, and were really excited to have nearly finished their media projects. However, a cyclone hit the island and all the equipment and files were destroyed.

While doing training on documentary making, the trainer told workshop participants to go out and do interviews and film scenes in the local area.

An organisation working with a network of people collected contact details (phone numbers and addresses) and other information on a database. One person in the team thought that it would be easier to put the database online so that everyone could access it more easily, but this meant that everything was made public. The organisation removed the information as soon as they found out.

A project aimed to raise the voices of victims of gender-based violence, and to hold community forums on the issue. The women participating felt very nervous about being involved, but if they didn't participate the project wouldn't work as planned.

Figure 9. Examples of ethical issues in media and communication projects.

Activity 2

Using your stakeholder map from module 3, consider all the possible ethical risks in your project. Try to put yourself in the shoes of your participants. Discuss how you will try to prevent the risks from happening, thinking about previous discussions about communicating with stakeholders. Note your answers in the risk assessment table below.

What are the ethical risks in your project?	Who might experience these risks?	How will you try to prevent (or manage) these risks?

Table 5. Identifying and managing ethical risks associated with media and communication projects.

Questions for discussion and reflection

1. What kind of ethical dilemmas have you come across in the past in your projects? What did you learn from these?

2. How can a more structured approach to ethics and engaging stakeholders inform future projects?

Keep your notes and your risk assessment. Ethical risks will be discussed again in module 8.

PART 2

Now that you've set the course, identified crew members and assessed the dangers, you need to gather the equipment for the journey: the maps, compasses, knowledge of the stars and signs of land that will tell you if you are headed in the right direction, and help you to know when to change tack.

So far the *IDEAS Guide* has focused on developing a clear picture of the design of your small grants project. Part 2 is all about monitoring and evaluation. Everything you have done in part 1 (modules 1-5) to define the project will now be used to create your evaluation plan, based on the things you and your stakeholders want to know. Part 2 will build upon the key points discussed previously, including:

- Evaluation is not just for the funders. It can also be useful for you, and for others involved with the project.

- Good evaluation supports learning. This means that it tells you what is working and how you could do it better.

- To be able to use evaluation for learning, you need to think about and plan evaluation at the beginning of the project, and build it into your project design.

- You are probably already doing 'evaluation' work; but you may not be thinking of it as evaluation, or you may not be doing it systematically.

Part 2 will help you to be organised and systematic in the way you get and use feedback and information. In monitoring and evaluation, this systematic information is called 'data'. You will also learn how to make sense of, or 'analyse', your data, to help generate 'evidence' that you can use and share with others.

Module 6: Planning data-use

Learning outcomes

At the end of this module you will be able to:

- consider who the audiences are for the data that you will collect;
- create a data-use calendar that outlines how and when you will communicate with, meet with, and share results and lessons with the stakeholders that you identified in modules 3 and 4.

Over the journey, you will be checking your compass, the stars and your maps to steer the course. You need to make time do this. You also need to make time to regularly keep in touch with those who are coming with you.

The information and feedback that you gather about your project is all important. It is part of what evaluators describe as 'data'.

Data is all the information and facts that have been gathered in a formal and systematic way, which can be analysed to find patterns and trends. It can include interview recordings and transcripts, questionnaire results, notes, photographs and other materials. Collecting and analysing the data that you get from communities and participants can help you to understand what is happening. Using data can also help you to explain what is happening to colleagues in your organisation, to partners and stakeholders in the community, and to funders. However, collecting data is only useful if it has a purpose.

Learning-based:

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

Uses and users of evaluation data

The data that you collect and analyse will have different uses for different stakeholders. For example, you may need to provide reports to the fund managers, and you may want to share reports with the communities you work with.

Activity 1

To identify the intended uses and users of the data, go back to your stakeholder map from module 3. Now consider and discuss:

• Which stakeholders might want to use the evaluation data?

• What will they use it for?

• When they will use it, and at what stage in the project will they need the data?

Remember, the data should also be useful for you to think about how you can improve the project.

Data-use calendar

Creating a data-use calendar, or adding the data-use activities to your project calendar at the beginning of the project, can help with planning. You can organise when and how you will sit down as a team to think about what the data means, and how you could improve the project. It also makes sure that everyone understands the expectations for reporting. If you already have a team or project calendar, you should build on that. If not, you could create one using Google calendars, or download a printable calendar (see http://www.calendarlabs.com/printable-calendar.php).

Activity 2

1. Add all of the activities you have planned to the calendar. (If you already have a project calendar with activities, you can skip this step.)

2. Add all of the times when you expect to collect data to the calendar.

3. Find out when you may have meetings or visits with your stakeholders, and when you need to report to your fund managers (see module 10 to get an idea of the ways in which you might report). Add these to the calendar.

4. List all the existing opportunities you have to meet with your team. For example, do you have regular team meetings? Add these to your calendar.

5. Now look at the gaps: do you have enough time and opportunities to analyse data between data collection and reporting to your stakeholders? Do you have enough time between activities to be able to use what you have learned in the next stages?

6. When you have completed your data-use calendar, send it to your fund managers and discuss your plans with them.

Learning from your data: The 'learning loop'

There are many ways to build learning into your organisation's everyday activities. The 'learning loop' (figure 10) is one of the tools that you could use in meetings to guide discussions. This can be found in appendix 1, and a printable/editable version is available at http://betterevaluation.org/resources/guide/IDEAS_Guide.

Using the learning loop

Begin by listing the recent activities, such as planning activities and meetings with different people. Then list the most significant insights and stories. After reflecting on these, discuss and note what you recommend should happen next. Are there some new actions you can take to improve the project, or to get it back on track? Remember, sometimes the best 'action' is to pause and wait for a better time, or to look around and think more deeply about the options.

Make some notes about what you've discussed in the diagram below and keep it for when you repeat the process at the next meeting so that the learning loop continues.
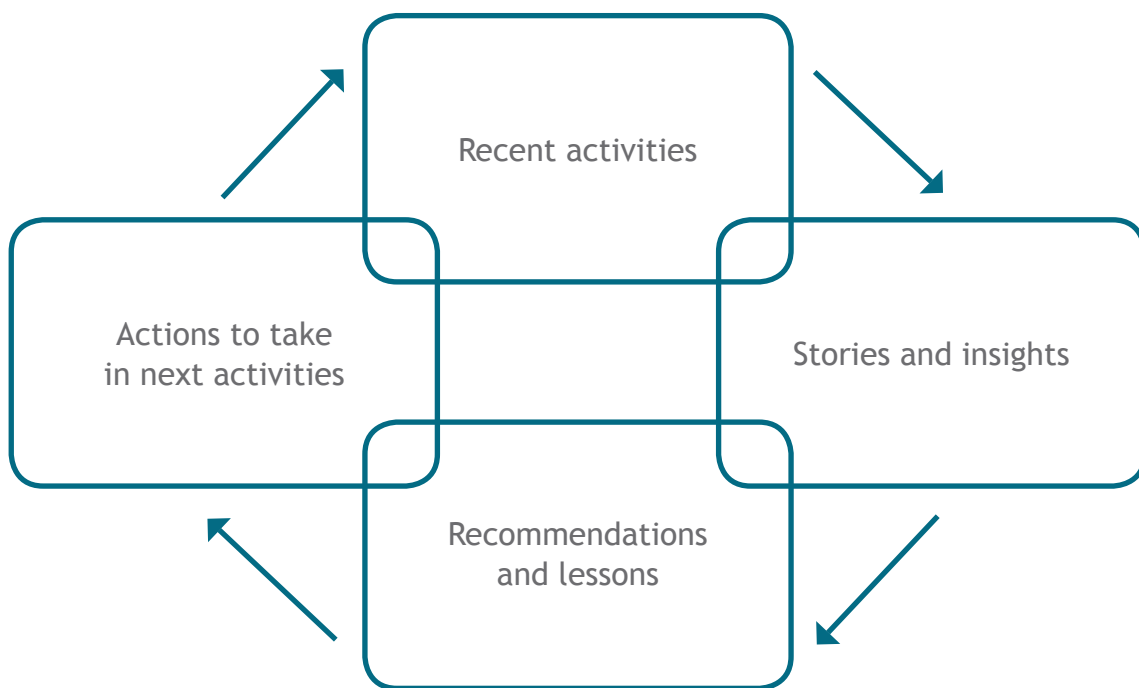
Figure 10. The learning loop.

Questions for discussion and reflection

1. Who do you need to share your data-use calendar with to ensure everyone understands and follows the plan?

2. Do you feel that you have enough time to implement the project, collect information on what's working, and communicate learning and findings with others?

Keep your data-use calendar. It will help you to develop your evaluation plan in module 8.

Module 7: Asking the right questions

Learning outcomes

At the end of this module you will be able to:

- think through what you need to know about your project and its progress;

- identify and adapt your own evaluation questions, based on the stakeholder mapping and the ranking activities.

What do you need to know to tell you if you're still heading on the right course? Identifying exactly what you'll need to know along the way (your questions) will help you to choose the right instruments.

Identifying appropriate and useful evaluation questions is often one of the most challenging parts of designing an evaluation. Allow yourself some time to complete this module, and try to involve as many of the people working on this project or program on the ground as possible.

Go back to module 1, and the kinds of evaluation questions that match your learning path, to help you with this section.

Emergent:

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

Thinking again about the uses and users of evaluation

Activity 1

Using your stakeholder map from module 3, and notes from your discussion on key uses and users in module 6, consider:

- Which stakeholders are key users and should be involved in identifying the key evaluation questions?

- How will you involve them? Will you inform them (tell them your decision), consult with them (ask them for their comments and feedback), or collaborate with them (work as equal partners to make decisions)?

If you are doing this activity as part of a workshop, note any plans to work with stakeholders. You can go through this module with your stakeholders at a later time.

Specifying the key evaluation questions

It is important that the evaluation questions match the project design (see module 2) and answer questions that will be useful for all users (see module 6). Your questions will also depend on the type of learning journey that you are on (see module 1).

Activity 2

Think of the list of common questions (p. 41) as being a bit like a menu of questions that you can select from and adapt. The questions have been colour-coded according to the four key media and communication project components: content, voice and dialogue, capacity-building, and infrastructure and systems (see module 2). Follow the steps below to adapt some of the questions to suit your own project, or create your own questions.

1. Read through the sample evaluation questions on page 41 (figure 11); especially the questions that relate to media and communication projects like yours.

2. Select some questions from the list that seem most useful for you. Using these questions as a guide, adapt the questions or develop new ones that are relevant to your project. Write these questions on sticky notes or pieces of paper.

3. You might have a large collection of potential questions now. If so, you need to select questions to focus on. There is no 'right' number of questions; but in small projects, it is better to concentrate on two to four good questions, rather than trying to cover too many.

4. If you can, ask your stakeholders (especially users of evaluation data) to select their priority questions, then compare the results (you might need to organise this for a later time). If this isn't possible, try to imagine the perspectives of each stakeholder on your list, and rearrange the priorities according to their interests and the uses of the evaluation. Compare the results.

5. Refer to the ranking activity in module 2 and make sure that the number of questions for each component matches up with how important they are to the success of your project.

Content

SCALE and REACH

- Who has seen the content?
- How many people have seen the content?

QUALITY

- Did the content have high production values (was it well-produced and of high quality)? In what ways was that important/unimportant to viewers/users?
- In what ways was the content engaging?
- In what ways was the content culturally relevant?

PROCESS

- How does the content produced reflect a participatory process?

IMPACTS

- What did audiences understand or learn about the topic?
- How did communities and others use the content?

Voice and dialogue

SCALE

- Which groups or people have been involved in dialogue or voice activities?
- What topics have been covered?

PROCESS

- What was done to get stakeholders and communities involved?
- Have safe spaces been created for community members to raise or discuss sensitive topics?
- What is the extent and level of participation of key groups or most affected groups in the dialogue or voice activities?
- To what extent have the participants been included in the planning? Was their feedback used to change the design of the project?

IMPACTS

- What were the actual results or actions at the end of the dialogue process?
- To what extent do participants feel able and confident to raise issues with decision makers and solve problems?
- To what extent are leaders more willing or able to hear communities, and to respond to their ideas and concerns?

Capacity-building

SCALE

- Who took part in training or mentoring processes?

QUALITY and RELEVANCE

- Are participants interested in further training?
- In what ways have the skills of participants improved?
- Have participants expressed interest in using their skills for future projects?
- How relevant are the skills or professional networks that you have built?

PROCESS

- How does the capacity-building reflect a participatory process?

IMPACTS

- How have participants put their new skills into practice?
- In what ways are participants or others using the networks and connections you established?
- How have participants (or others) benefited?

Infrastructure and systems

SCALE and REACH

- Who has been involved in building or changing the infrastructure or system? (that is, laws, equipment, cables, networks, systems)?
- How many people have been affected by the change? How many were involved?
- What is the scale or reach of the infrastructure or system?

QUALITY and RELEVANCE

- How well is the system or added infrastructure working?
- How are people using the system or infrastructure, and for what purposes?

PROCESS

- How have stakeholders been involved in the planning and design of the infrastructure or system?
- What kinds of plans are there for support and maintenance for systems and equipment?

IMPACTS

- How have people used and benefited from the system or infrastructure that you set up?

Figure 11. Examples of evaluation questions.

Questions for discussion and reflection

1. Are there any questions you have about your project that are not covered by your selected key questions?

2. What processes will you follow to find out what questions your stakeholders have?

Keep your selection of priority evaluation questions on sticky notes for the next module.

Module 8: Planning information and data collection

Learning outcomes

At the end of this module you will be able to:

- understand more about the data collection and evaluation methods that you currently use, and be able to use less familiar methods;
- use creative methods for evaluation;
- identify methods that will allow you to answer your evaluation questions;
- create an evaluation plan that will help your organisation gather information on your project or program.

Now that you have identified what you need to know, it's time to choose the right instruments. We have compiled methods cards to help you identify different ways to answer your questions – think of them as being like a good compass and a reliable map, which give you accurate information on the course you are steering.

Tracking project activities and achievements ('monitoring')

As you start to implement your project, it is important to keep good records of all of your activities and achievements so that you can 'monitor' your progress. Depending on your project, this might be:

- the number of workshops or meetings (including dates and agendas);
- the number of people who have attended your workshops or meetings (including the number of men and the number of women);
- the number of pieces of content produced; and/or
- the number of people who have viewed, listened to, or used your content or system.

Audience and participation tracking online

If you have or are developing a website as part of your project, there are ways to collect information about your audience and participants that can be used for evaluation.

Google Analytics is a free tool that you can sign up for at https://www.google.com.au/analytics/. This will give you information about how many people visit your website, what they look at, where they come from and even what they are using to look at your website (e.g., a phone or tablet). Note that Google Analytics premium tools do cost money, so if this kind of data is important, you may need to ask for additional funds to support tracking activities.

Keeping track of this information can give a quick indication of your progress. For example, if more people attended your film screening events each time, it might mean that word is spreading that your film is good. Counting the smaller groups within the totals is also useful. This might mean counting the number of men, women, young people, people with disabilities and people from minority groups.

Sometimes your tracking might show something surprising that you need to investigate. For example, if you find that the number of people attending your film screenings is increasing, but the number of women is decreasing, it is important to try to find out why fewer women are attending.

Funders are also often interested in knowing this monitoring information so that they can get a sense of how the project is progressing, and who is participating or benefiting. Sometimes funders have specific things they want to know, and sometimes they might need this information as a way to check that you have used the money as agreed before they can give the next installment of funding.

Tools for tracking and monitoring

• Attendance/sign-in sheets with columns for name, age, and male or female.

• Keeping notes of meetings or events, or saving the workshop schedule.

• Keeping a logbook near the phone to record feedback.

• Keeping a project diary to record the dates of all your activities.

• Saving a copy of the content in one place. This may include cutting out newspaper articles, and saving webpages, videos or comments on the content.

• Recording the number of 'likes' on Facebook, or the number of 'views' on YouTube or Vimeo at regular intervals. This can be daily, weekly or monthly.

Creating a monitoring plan

Activity 1

What kinds of things can you keep track of as signs of progress? Fill in the table below to create a tracking and monitoring plan.

Things you can/need to track or count	Tools you will use to track and monitor	Notes (add things like frequency, locations, etc.)	Person responsible
E.g.: The number of people who attend each day of training (number of men and women, and their ages).	Attendance sheet.	Each day of training for all three rounds of training.	Jackie.

Table 6. Creating a tracking and monitoring plan.

Capturing the unexpected

However well you plan your project, there will always be surprises. Some of these surprises will be welcome, and others may make you rethink your activities. Unexpected events often present useful opportunities to reflect on, learn about, and improve your project.

This kind of information may be missed by your main methods for collecting data, since the methods are tied closely to your plans and predetermined evaluation questions. Some practical ways to capture the unexpected are to:

• keep a diary or journal for your project and record your thoughts and observations. For interesting and unexpected things, make sure you record details such as when, where, who and how, and what you think the implications are for your project.

• use a form to quickly fill in details of unexpected events as they arise. We have included an example below. It's a good idea to print off the forms and have them handy.

These processes can be reviewed in project meetings and will be discussed in more detail in the next module.

Unexpected event tracking tool

Here is an example of a form you can use to record unexpected events. This form is included in appendix 2, and a printable/editable version is available at http://betterevaluation.org/resources/guide/IDEAS_Guide.

Date:

Description of unusual event:

Implications for your project (if any):

Recommended adjustments to your project or activities (if any):

Reported by:

Contact person for follow up:

Figure 12. Template for recording unexpected events.

Choosing evaluation methods using methods cards

There are many options for collecting data to evaluate your project. Some take a lot of time and resources, while others can be fast and straightforward. The methods cards included in this guide (see http://betterevaluation.org/resources/guide/IDEAS_Guide to download) are intended to help your team choose the best method(s) to answer your key evaluation questions.

Realistic:

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

Activity 2

For this group activity you will need your methods cards and your evaluation questions from the previous module.

1. Write each evaluation question (from module 7) on sticky notes or pieces of paper (one question per note).

2. Read through the methods cards.

3. Looking at your evaluation questions one by one, go through the set of methods cards and try to identify which methods might help you answer your questions. Place each potential method next to the evaluation question.

4. For each method, note the information source (e.g., community members, staff, training participants, audience members at events).

5. There are many methods you can use to answer your evaluation questions, but it's best to keep it simple and use only one or two methods for each. Start with the most important questions you've identified and move

Critical:

What are the differences in age, gender, language, education, community group and community status that might lead to differences in power and affect confidence to speak? Awareness of these differences helps you to choose the best approach.

down the list. When considering which method is best for answering each of your questions, consider the following questions:

- Which of these methods can easily be incorporated into current project activities?

- How realistic are each of the methods, given the time and resources that you have? (The cards have ratings for difficulty, time and resources.)

- If you are considering more than one method for each question, what is the benefit of this? Does it bring new insights that the other methods do not?

- Could you make the most of limited resources and use one method to answer several questions? What would be the benefit, or the limitations, of this?

- Which method will best demonstrate the objectives of your program?

- Which methods enable the opinions of different groups (such as women, youth and people with disabilities) to be collected?

Ethics in data collection and evaluation

When collecting data from people for monitoring and evaluation, there are ethical issues to consider. Just like for the project as a whole, it is important to get informed consent (see module 5 for more about informed consent). You need to explain clearly what the evaluation is about and what the information will be used for. People have the right to refuse at any time during the course of the project, and the right to be anonymous.

There are also other issues to think about, such as:

- How do you talk to participants about being part of the evaluation?

- What is the right way to ask people for their feedback and observations about the project?

- What can you do to help people feel comfortable to give open feedback (e.g., in workshops, in questionnaires, in a group setting and in a one-to-one setting)?

Look back at your notes from modules 4 and 5 to help you work through these questions.

Understanding privacy in evaluation

Privacy is particularly important to consider in evaluation. As discussed in module 5, people need to know what information will be shared, who it will be shared with, and whether it will be identifiable or anonymous. Questions to consider include:

- Are you planning to collect or share information about people that is personal or might not be common knowledge?

- Who will have access to this information and when?

- Will the information be stored safely and securely?

- Will you ask people's names on surveys and questionnaires?

- Will you use people's names when you use things they say in reports?

- Will you include photos or videos of people in reports or on websites?

Compiling an evaluation plan[6]

Activity 3

When you have considered which methods you will use, and considered the ethical issues, you are ready to create an evaluation plan. There is an example on page 50, and a blank template that you can fill in on page 51 (a printable/editable version is also available at http://betterevaluation.org/resources/guide/IDEAS_Guide). Go back to your data-use calendar in module 6 and build on what you've already done. When you have an evaluation plan, you can share it with the stakeholders you have identified as having an interest in the evaluation.

6. Adapted from http://www.mc3edsupport.org/community/kb_files/evalquestions_worksheet5.pdf.

Evaluation question	Methods to collect data	When?	Where?	Who? (Or what?)	How many?	Ethical considerations
E.g.: What was the audience's reaction to the content?	Focus group/group discussion	Aug	Local village cinemas	Facilitator & audience	• 10 audience members per screening • 5 screenings, 1 group discussion in each	Representation: Do people still consent now that they have seen the film?
	Individual short questionnaire or survey	Aug	Local village cinemas	Volunteers from audience	• 30 audience members per screening • 5 screenings	Are you keeping people's responses confidential?
E.g.: Is the content nationally available and publicised?	Monitor distribution through mapping activity	Aug-Dec	Nationally	Distribution partners	10 urban distribution centres	Do people consent to having their images used to promote the film?
	Monitor media coverage through content analysis	Aug-Dec	Nationally	Radio: NBC TV: Kundu2, EmTv Print: Post Courier, National, Stella Magazine	6 media outlets	Are you keeping your data secure and safe?

Table 7. An evaluation plan.

Evaluation question	Methods to collect data	When?	Where?	Who? (Or what?)	How many?	Ethical considerations

Table 8. An evaluation plan template.

Questions for discussion and reflection

1. What new methods did you learn about that you would like to explore further? (You can see the links on the methods cards for more information, as well as the resources section at the end of this guide.)

2. What ethical issues will you need to consider for the methods you have chosen to answer your questions?

The draft evaluation plan you have developed in this module may need to be shared with stakeholders for review and feedback. An editable version of the template is available for download at http://betterevaluation.org/resources/guide/IDEAS_Guide.

Module 9: Making sense of data

Learning outcomes

At the end of this module you will be able to:

- manage the data that you have collected using the methods learned in module 8;
- understand the difference between quantitative and qualitative data;
- analyse some of the data that you have collected;
- understand how data analysis can help make reporting and sharing findings easier.

You've chosen navigation tools and started collecting data, now you need to understand how to make sense of what the data is telling you, and track this over time, so you can keep adjusting the steering and changing tack as you make your way towards your island.

This module offers a guide through the processes of managing and making sense of data ('analysing' data). Managing and analysing data can be a big job, so we recommend that you do this as you are running the project. Don't wait until the end to manage and analyse all the data. Doing this as you go along also means you can use the data to improve or adjust your activities. You may consider involving some of your stakeholders in this process. Review your stakeholder map from module 3 and consider which groups could help you to make sense of the data.

Managing data

It is very important to keep good records of all your data. On page 54 are examples of label templates for individual and group data (these templates are in appendix 3, and a printable/editable version is available at http://betterevaluation.org/resources/guide/IDEAS_Guide). These will give you easy access to the name (or basic demographics, e.g., male/female) and date, as well as where the data was collected, the type of data (or methods used to collect the data), and a short summary of what is in the data or what is interesting about a particular data source.

Complex:

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

Individual

Date:

Data type:

Location:

Name:

Role or position:

Gender:

Age:

Summary or comments:

Figure 14. Individual data label template.

Group

Date:

Data type:

Location:

Title of activity:

Number of participants:

Summary or comments:

Figure 15. Group data label template.

Analysing data

Analysing data is about bringing together the different kinds of data you have collected to look for patterns. Analysing data requires asking questions, such as, *What are the similarities or differences?*

When talking about analysing data, it is helpful to understand that there are two general kinds of data:

Data based on numbers (quantitative)
e.g.: surveys

Data based on words, stories and images (qualitative)
e.g.: interviews

Now we will look at some of the types of patterns you can look for in quantitative and qualitative data. (Note: The methods cards from module 8 indicate which kind of data each method generates.)

The methods you have chosen will determine how your data is managed and analysed, and also whether the data is qualitative or quantitative.

Data based on numbers (quantitative data analysis)

Any quantitative data you have, such as from short questionnaire surveys or rankings, can be analysed by looking for patterns in the numbers. This can help you to reflect on the following questions:

• What are the main conclusions from the numbers across the set of data?

• Are there differences in responses by age, gender or location?

• If you repeated the questionnaire or workshop, what changes have there been in people's responses over time?

• Does your data suggest ways in which your activities have made a difference to individuals and/or groups, in either positive or negative ways?

How to analyse the numbers

Quantitative data analysis can be important for many organisations to help communicate impact. For example, if you surveyed 50 people after a community screening for your film, you might want to analyse how many people thought the film effectively highlighted a key issue in the community.

First, read through all the surveys and count people's responses to each question. For example, if you gave people the option to answer '*Strongly Agree*', '*Agree*', and '*Disagree*', '*Strongly Disagree*', first count how many people have marked *Strongly Agree* to the first question. Then do this for *Agree*, *Disagree*, *Strongly Disagree*. Then repeat for all other questions. When you are counting, set aside any surveys that you cannot read, or any that are unclear. You will not be able to include these in your analysis.

For example, an organisation recently finished a film on climate change in the Pacific, which they screened in a coastal village community. 24 viewers *Strongly Agree* that the film highlighted important issues; 12 marked *Agree*; and 8 marked they did not agree or disagree. 4 marked that they *Disagree* that the film highlighted important issues in the community. 1 person did not answer this survey question and 1 person marked two answers, so these 2 surveys could not be counted in the analysis.

You can work out the percentage of people who *Strongly Agree* that the film addressed important community issues by dividing the number by of people who *Strongly Agree* by the total people who were surveyed who saw your film, and multiplying that number by 100. For example:

$$\frac{24 \text{ people who liked the film}}{48 \text{ people surveyed}} \quad \text{x} \quad 100 \quad = \quad 50\%$$

Therefore, half of the people surveyed *Strongly Agree* that the film highlighted important issues in the community.

Data based on words and stories (qualitative data analysis)

Qualitative data is often text, language or story-based (not based on numbers). The data can include a range of types of data, such as your notes and observations, interview materials, group discussion materials, collected stories and photographs. As with quantitative data, the idea is to look for patterns (similarities as well as differences). Consider:

- Can you summarise the key points from each of the stories?

- What do the different stories say about your different evaluation questions?

- What kinds of things are similar across all the stories, and what things are different?

- Can you identify any differences across groups, such as age groups, gender or location?

- Does your data suggest ways in which your activities have made a difference to individuals and/or groups, in either positive or negative ways?

TIP: If you do qualitative data collection, such as interviews and observation notes, it can be a good idea to write a summary immediately after the data is collected for quick reference. You can use or adapt the data label templates in appendix 3.

How to make sense of words and story-based data

Making sense of words-based data, like interviews and focus group discussions, can be complicated. Like any skill, it takes lots of practice to become confident in doing it. Here we outline some steps to help you get started. We strongly recommend that you follow these steps with your project team, and other interested stakeholders, because the more you can discuss the patterns and differences, the better your analysis will be.

You will need: Your words-based data (qualitative data), sticky notes, flip chart/butchers paper, your project team and other interested stakeholders.

Before the data analysis meeting

Gather all the data together. For longer pieces of data, such as interviews, try to write some dot points of the main ideas, and clip this to the interview.

Write your evaluation questions on the flip chart paper – one question per piece of paper. On another piece of flip chart paper write 'Other'.

At the data analysis meeting

Begin the meeting by looking at and reading all the data (or the dot point summaries).

Look for 'key points', like opinions, ideas or experiences. Write the key points on sticky notes – one point per note. Also include a note about where the point has come from or who said it.

Now match the sticky notes to the pieces of flip chart paper, choosing the one with the evaluation question that the key point best answers. If it doesn't answer any of the questions, put it on the paper that says 'Other'. Repeat this until all the sticky notes are matched to the pieces of flip chart paper.

Looking at each evaluation question (one at a time), move the sticky notes around into groups of ideas that are similar.

Looking at the groups of sticky notes, try to write one or two words to describe why they are related. Repeat this process for each group on each of the pieces of paper.

As a group, discuss if there are there any similarities or differences across different groups, such as age groups, gender or location. Make a note of these differences.

The last step is to record a summary of your analysis. Take photos and write a summary of the groups of ideas.

TIP: You can follow the same process to combine different kinds of data, including data based on numbers and data based on words.

Evaluating a workshop: An example

This example comes from an evaluation of a workshop. The evaluation question was, *How successful was the workshop?*
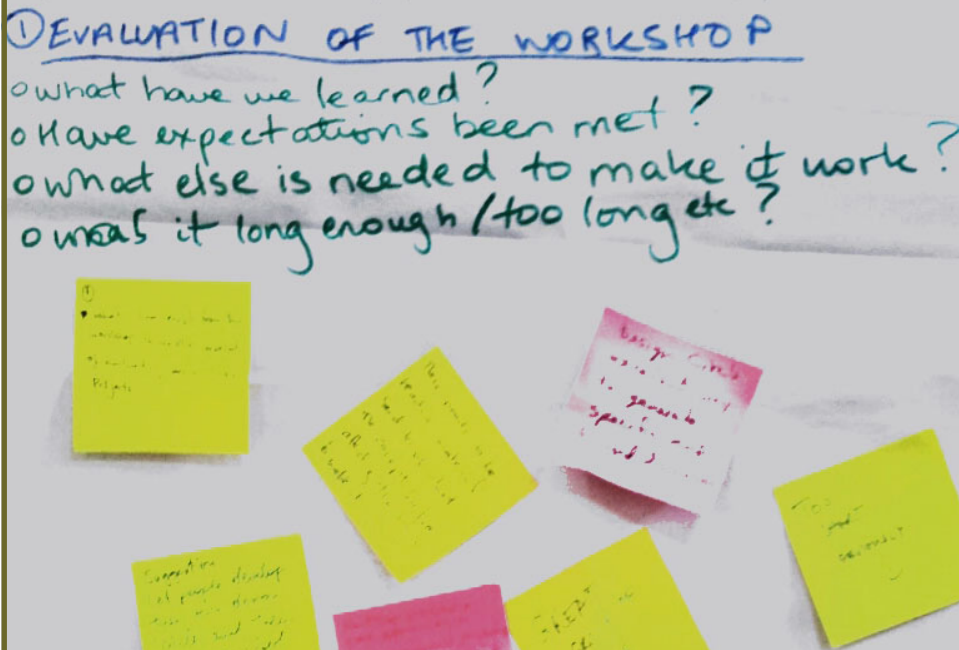

Figure 17. Workshop feedback.

The team read all of the comments from workshop participants, then wrote each comment on a sticky note, and then they moved them into groups based on similar ideas. Here are the comments organised into similar ideas:

Suggestions

'There needs to be reading material sent to us about the concept attending the training[?] to make it work.'

'Suggestion: let people develop their own design and then create a tool from that process.'

Positives

'Workshop provided a good opportunity to discuss different perspectives with people in different positions on the evaluation process.'

'Great group of people.'

'Design circle excellent way to generate specific and focused discussion.'

'Learning: understanding other people's perspectives and projects (funders, facilitators, implementers, etc.).'

'It was great being able to engage in dialogue with the different stakeholders, funder/development partners, etc.'

Negatives

'It was hard to concentrate on workshop after doing the conference all week.'

'It was difficult to come back into the room at 4pm on Friday. People were tired and unenthused. Thanks for not making us do a task over dinner.'

Negatives – not enough time

'It did not really meet the expectation but would be good if the training is run separately and attached to another training[?].'

'Too short.'

'Expectations: More time and activities to explore individual projects so that we can get support on them and think more critically. However, I don't feel that we reached this depth of inquiry and analysis.'

'Too short obviously :-)'

'Workshop timing was just too short. Learned about other projects which was great.'

'More time would've been ideal.'

The themes of the groups were 'suggestions', 'positives' and 'negatives'. Within the 'negatives' theme, there was a smaller theme about 'not enough time'. The team then summarised the key points into a paragraph, covering each of the themes.

> *In evaluating the workshop itself, several valued the opportunity to understand different perspectives from different types of stakeholders. A theme throughout the feedback was that the workshop was too short. Aside from allowing more time, for future workshops it would be important to note that there wasn't a lot of support for the timing of the workshop as a follow-on from the conference, and some specifically stated that it would have been better as a separate event.*

The project team kept this paragraph, and used it in their report (see module 10).

Activity

Working in your project teams, take some time to make a plan for your data management and analysis by answering the questions in the table below.

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

Table 9. Data management and analysis plan.

After you analyse some of the data, you may have some new questions. You could even go back to module 8 to decide what methods might be helpful in answering your new questions.

Questions for discussion and reflection

1. Which aspects of making sense of data are the most challenging, and where can you go for help?

2. What are the key data management and analysis strategies you will use to make sure that you use evidence to make improvements to the project?

Module 10: Reporting and sharing

Learning outcomes

At the end of this module you will be able to:

- report using the data collected and analysed in modules 8 and 9;
- identify the best ways to share and communicate your findings;
- understand all the different ways to communicate your findings, outside of formal reporting, and think through which one is right for you and your project.

Part of the joy of any exploration is sharing your new-found knowledge. Those who have followed you on your journey will want to know how your journey went, and whether you ended up at your island destination as expected and what you found along the way.

Planning how to share your findings

Most people think of text-based reports when they think about how to share their findings. Written reports are fine if you and your stakeholders are most comfortable with this way of communicating, but there are also other alternative, 'innovative' ways of communicating.

Traditional reporting

The traditional way of reporting is by writing a text-based document. Many funders have a template that they expect to be used. Reports usually include the following sections:

Summary	A short summary of the whole evaluation report.
Introduction	You can explain who the key users are, and what they will use it for (module 6). You can also explain the key questions (module 7).
Methodology and methods	You can include the evaluation plan (module 8), which shows which methods were used to answer the questions, and your information sources.
Discussion of findings	You can use write a summary based on your data analysis (module 9).
Conclusions and recommendations	A summary of what this means for your project or other similar projects. What did you learn along the way? How could you improve?

Table 10. Components of traditional reports.

Innovative reporting

Non-traditional and innovative options can be fun and give different insights. These are especially good when the things you are trying to say are difficult to write in words. These options often present information in ways that are easier to understand. Many funding organisations now welcome new ways of communicating the effectiveness and impact of innovative projects. However, if you are considering non-traditional reporting methods, this should be negotiated with funders to see if they will agree to your ideas.

Choosing reporting options using reporting cards

Activity

The reporting cards included in this guide (see http://betterevaluation.org/resources/guide/IDEAS_Guide to download) provide a range of options to consider for your regular reporting.

1. Read through the reporting cards.

2. Refer back to your stakeholder map (module 3) and think about who you want to report to, and how you want to communicate.

3. You might need to use different kinds of reporting methods for different stakeholders, but always be realistic and try not to commit to too many.

4. Add your plans for sharing your findings to your data-use calendar (module 6). Make sure you allow time to prepare the reporting materials.

Using video as a reporting method: An example

A simple way to use video in evaluation is to use a journalistic format called 'vox pop'. To do this, you:

- interview a range of people involved in your project and ask them same 1-3 questions.

- edit by putting all the answers to each question together.

- might add subtitles if it is hard to hear or understand the questions or answers.

The Rugby Plus program (funded by PACMAS and delivered in Fiji, Samoa, the Solomon Islands and PNG) used this video technique. They asked participants, *What did you learn from the program?* You can view the video at https://www.youtube.com/watch?v=RkEUpX7gSt4.

Below is a sample of the storyboard of their video so you can see how it works.
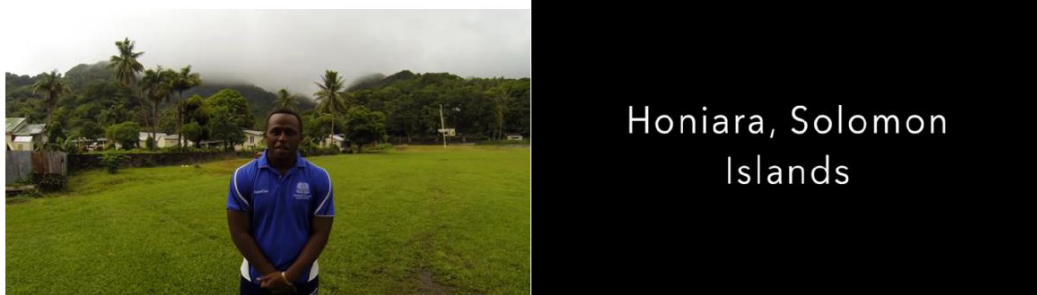
Figure 18. Rugby Plus storyboard sample. Images courtesy of Rugby Plus program, Island Breeze and PACMAS.

Questions for discussion and reflection

1. With all that you have learnt, do you feel that you are able to incorporate evaluation into your project design, delivery and reporting cycle?

2. If non-traditional and visual methods of reporting, such as video and photography, appeal to you, do you feel that you can talk to your stakeholders and funders to incorporate more of these into your reporting?

Conclusion

In this guide we hope that you have found some of the tools to help begin navigating your way on your own learning journey. In module 1, you started thinking about learning as a part of projects and your ideas about evaluation. Module 2 focused on identifying the destination and how you intend to get there. Module 3 was about getting to know who is involved in making your project a success. This was followed in module 4 by discussions about the different kinds of expertise you will need for your journey, and how you will communicate respectfully and effectively with your crew members. In module 5 you considered the risks and developed plans for how to make sure everyone made their own decisions about whether to risk reefs, tides and other perils of the sea. In module 6 you created a data-use calendar that sets out when you need to take a break and determine where your project is at, and if your project is still on track. You developed your project's evaluation questions in module 7, and in module 8, you chose which navigation tools to use to help you to answer your evaluation questions. In module 9 you learned how to manage and analyse data. Finally, in module 10, you discussed how to report and share news and discoveries from your journey with funders, and with other stakeholders.

As the saying goes, you can't always change the way the wind is blowing, but you can change the way your canoe is facing. These 10 modules should help you decide which way to face your canoe and how to make the most of the winds to find your way to your destination, even if you have to take the long way around.

Additional resources to help you as you continue learning, and developing your own evaluation plans and strategies, are listed in appendix 4. Please also contact the authors if you have any questions or feedback on how to improve this guide.

We wish you well on all your future journeys.

Appendix 1: The learning loop

Instructions for using this tool can be found on page 38.
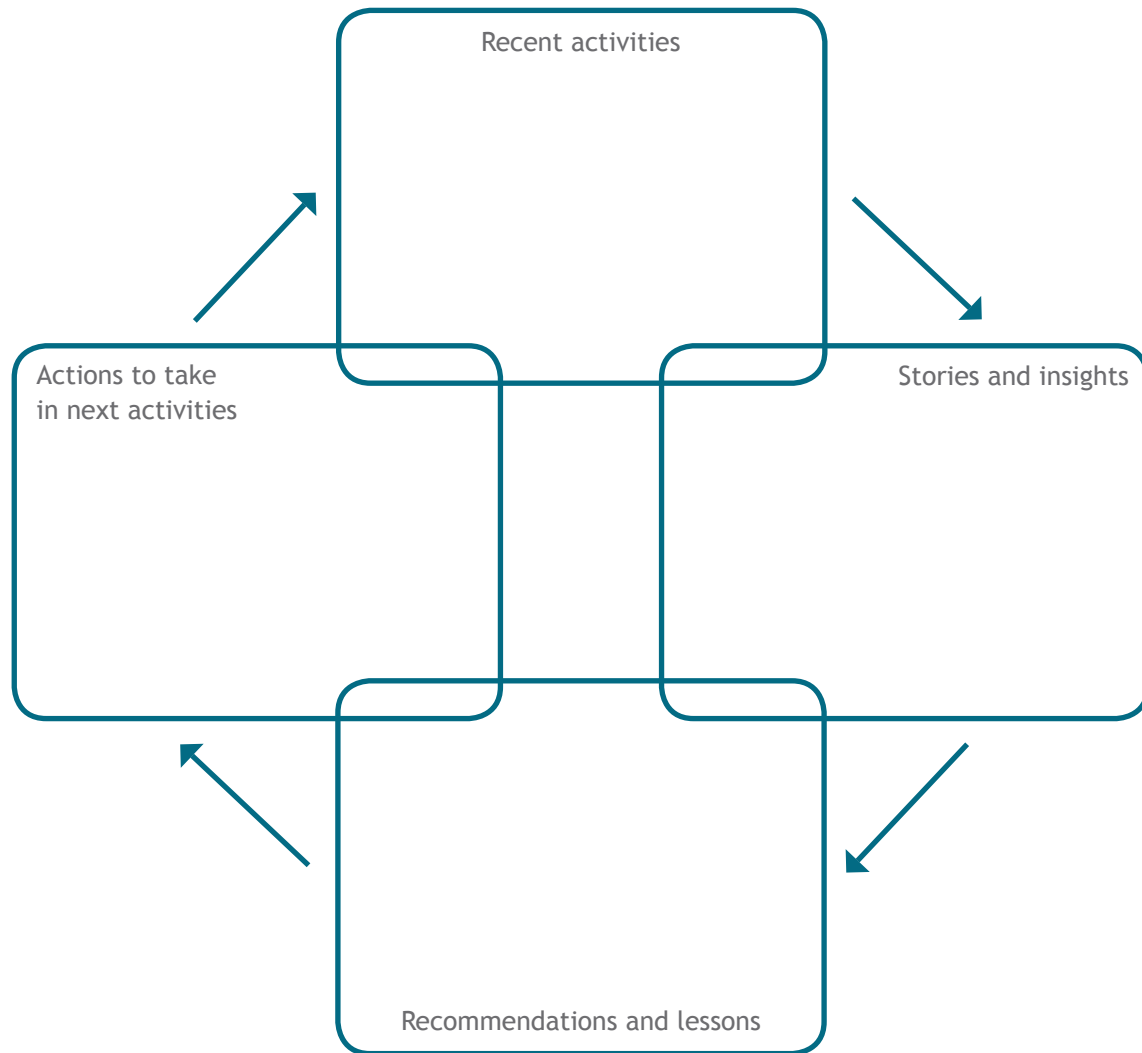
Other notes

Appendix 2: Unexpected event tracking tool

Information on using this tool can be found on pages 45-46.

Date:

Description of unusual event:

Implications for your project (if any):

Recommended adjustments to your project or activities (if any):

Reported by:

Contact person for follow up:

Date:

Description of unusual event:

Implications for your project (if any):

Recommended adjustments to your project or activities (if any):

Reported by:

Contact person for follow up:

Appendix 3: Data label templates

Information on using this tool can be found on pages 53-54.

Individual
Date:
Data type:
Location:
Name:
Role or position:
Gender:
Age:
Summary or comments:

Individual
Date:
Data type:
Location:
Name:
Role or position:
Gender:
Age:
Summary or comments:

Group

Date:

Data type:

Location:

Title of activity:

Number of participants:

Summary or comments:

Group

Date:

Data type:

Location:

Title of activity:

Number of participants:

Summary or comments:

Appendix 4: Additional learning resources

Books and literature

Lennie, J. and Tacchi, J. (2013). *Evaluating communication for development: A framework for social change*. Routledge, New York.
A book that discusses the principles for evaluating media, communication and development projects.

Noske-Turner, J. (2014). *Navigating theory, negotiating difference and beating the system: a critical how-to of media assistance evaluation*. Queensland University of Technology. Eprints.qut.edu.au/78979/1/Jessica_Noske-Turner_Thesis.pdf
This thesis identifies evaluation design as a core challenge in media, communication and development project evaluation. It adapts a framework for identifying the components (content, voice and dialogue, capacity-building, systems and infrastructure) of evaluation, and proposes methods cards as a tool for negotiating evaluation design.

Websites

Better Evaluation www.betterevaluation.org
A good site to find and share resources on how to design and implement your own evaluation.

Placestories www.placestories.com
Placestories is a free-to-download digital storytelling software and publishing platform that allows you to create multimedia postcards and photo stories (stories that include still images, text, narrative and music), and to embed images, sound and video files. Stories can be shared publicly or privately.

Glossary

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

data Information that is collected systematically.

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

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

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

qualitative Data or information based on words or stories.

quantitative Data or information based on numbers.

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

Notes

PACMAS
Pacific Media Assistance Scheme