

Mastering Mixed Methods – Theory and Practice

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Intermediate

Participant prerequisites: 5-8+ years of field experience implementing evaluation, research, M&E (M&E experience should be within programs/organizations, not intermittent/ external consultant).

Minimum / Maximum: 8-20

Rationale: This workshop addresses a significant and growing challenge in contemporary evaluation: confusion and misuse of mixed methods and evidence. Fortunately, the logic of sound evidence can help align all of our methods toward learning, with thoughtful deliberation engaging multiple perspectives. This workshop builds participant competencies and appreciation for the value of diverse methods, flexibly integrated as appropriate in the face of real-world time and budget constraints. Mastering mixed methods focuses on three phases that highlight key decision processes: Commission and design/strategy; Operations/implementation; and Results analysis and communication for effective use.

Purpose / Objectives: Collaborating on methods best suited to generate meaningful evidence improves evaluation toward better learning and more transformative impact. Using case studies with a variety of methods and information needs, we will work through these key steps with a focus on selected questions of evaluation design and implementation. We will use exercises to build skills that participants can apply to strengthen the quality and impact of current and future evaluation assignments. Participants will gain knowledge and experience that can improve their strategy in confronting evaluation challenges, ability to collaborate and communicate essential evaluation guardrails, and confidence in methodology that produces sound (valid, reliable, relevant) information for improved insights and decisions.

Learning Objectives: At the conclusion of this workshop, participants will be able to:

1. leverage strengths and limitations correctly to select and use methodological approaches that address a variety of evaluation challenges - with constant focus on credible evidence;
2. justify methodological choices using links between questions, data, and evidence in order to meet a range of information needs or evaluation purposes; and
3. lead or contribute to practical & effective M&E/evaluation designs, fieldwork, and deliverables.

Overview of Workshop Methods / Activities:

Participants will engage through interactive presentations and hands-on exercises to think critically and strengthen skills in using collaborative processes and an appropriate mix of methods that respond effectively to evaluation needs and purposes. Case(s) used in the workshop will be training versions drawn from professional evaluations conducted by the facilitator, such as evaluating health, education, or quality of life results of training and resilience programs; safe motherhood activities; treatment of musculoskeletal abnormalities; and/or workforce development initiatives.

Participants will contribute expertise and experience according to their backgrounds, and will practice collaboration and communication as well as evaluation skills-building in small groups. The first part of the workshop will focus on design, and the value and trade-offs of possible methods given case realities. The facilitator will structure the starting points, while each group will explore alternatives and limitations to build a plan and justify their decisions. The second part of the workshop will build from the first with additional facilitation around case context, and individuals and groups will bring to bear their own knowledge while collaborating on best paths forward that optimize the balance between feasible options and meaningful results. Workshop activities will culminate in exercises to analyze and present sample results toward communicating points of value effectively to key evaluation partners, as well as consolidating lessons learned through the day's exercises.