Introduction to Evaluation: Measuring impact for Europlanet RI 2024

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Overview

• What is evaluation?
• Why evaluate?
• How to do it? (Logic model)
• Evaluation for Europlanet RI 2024
  • Structure
  • Your role (and mine)
What is evaluation?

• “A **systematic** determination of a subject's **merit**, **worth** and **significance**, using **criteria** governed by a set of standards.”

• Assessment of whether aims of [RI 2024] were reached

• Data collected and assessed against set of criteria

• Wide range of approaches used

• More specific than ‘research’ (but it’s a continuum)
Why evaluate?

• Funder [EC] demands it (and won’t just accept your word for it)
  • May be needed to obtain future funding, or as a condition of existing funding
• To find out whether activity is actually meeting its aims and objectives
• To be able to argue for your activity’s value
  • Advocacy within Horizon Europe
• To improve your practice/activity [sustainability]
• To inform the development of other activities
• It benefits you!
Starting questions

• What do I want to find out? (What do we need to know? What would we like to know? Impact?)

• How will the findings be used?

• What methods might I use? (WHO might collect the data?)

• How might I analyse the data?

• What are my resource (time/budget) constraints?
Choosing methods

• Quantitative: concerned with discovering ‘facts’; measurement – numerical; better suited for ‘Who?’ and ‘What?’ questions

• Qualitative: concerned with understanding situations/experiences from the participant’s perspective; in-depth, rich detail and context; better suited for answering ‘Why?’ questions

• Mixed methods
Evaluation: Summative/Impact

• At the end
• Establishes whether the activity has met its objectives
• May try to look at impact
• Most effective/productive when can inform future projects/activities
Logic model - overview

• A visual depiction of how a project (or infrastructure) works
• Logic models link outcomes with project activities and underlying assumptions
• Should be developed collaboratively
• Can evolve and change over the course of a project
• Consists of inputs, activities, outputs, outcomes/impacts
Some definitions

• Inputs – resources available to or needed for the project
• Activities – things the project does (e.g. providing visits, allowing access to data, etc)
• Outputs – products or services of the activity; QUANTIFIABLE
• Outcomes – changes to individuals, groups or communities resulting from experience
Logic model

Figure 1. The logic model – how to measure impacts

- Input
  - Fundings
  - Co-investment
  - Other resources

- Activities
  - Scientific
  - Training
  - Industrial

- Output
  - Publications
  - Collaborations
  - Knowledge transfer
  - Knowledge creation
  - Job creation

- Impact
  - Economic growth
  - Innovation for society
  - Social capital
  - Increase innovative performance (region)
  - Better health
  - Better environment
REFERENCE FRAMEWORK FOR ASSESSING THE SCIENTIFIC AND SOCIO-ECONOMIC IMPACT OF RESEARCH INFRASTRUCTURES

OECD SCIENCE, TECHNOLOGY AND INDUSTRY POLICY PAPERS
March 2019  No. 65
Indicators

• Link to evaluation
• What are the (key) indicators (for TAs, VAs, NAs)?
• How do we capture them (methods)?
Evaluation for RI 2024 – overview

• Work-in-progress (comprehensive)

• Working backwards from impacts – what is the difference we’ve made and how did we do it?

• Attend to EC interests: working with industry, value of TA visits (are they necessary?), socioeconomic impact, role of RI in widening science base in Europe [big picture]

• Series of case studies, structured around indicators
Evaluation for RI 2024 – structure

• Series of case studies, structured around indicators
• Online templates to collect quantitative indicators/metrics
  • Organised by TA, VA, NA
  • Can be modified!
• Follow-up surveys with participants (TA, NA)
• Interviews (telephones) with subset of participants (e.g. visitors to TAs)
  • ‘Train the trainer’
• Focus groups at conferences
• Ongoing discussions with TA/VA/NA managers (collating other data sources)
Evaluation for RI 2024 – your role

• Depends on your role (TA/VA/NA)
• Filling in online templates with quantitative indicators/metrics
  • Data entry – ongoing/every six months [tbc]
  • Entry structured around timelines of activities (so likely to vary)
• Distributing participant surveys [TA/NA]
• Identify individuals to interview (e.g. visitors to TAs)
• Feeding back on the process!
Questions?
Evaluation for RI 2024 – Today’s task

• On your tables (grouped by VA/TA/NA)
• Review impacts and indicators table
• Discuss:
  • Which are applicable to your activity? (Please tag with your activity)
  • Which are priorities?
  • Are there other indicators better suited to capturing these aims?
  • ARE THERE ANY MISSING??
• Feedback