**The Evaluation Ladder: a ‘testing’ approach** 

**Creativity is just connecting things. (*Steve Jobs)***

In delivering over 115 evaluation projects, we have identified strong patterns in what works and what doesn’t in many types of projects. Having also appraised numerous project applications, we have mapped repeating patterns of strengths and weaknesses in the design and delivery of projects. These key factors occur at the 7 rungs in the evaluation ladder. They represent recurring Critical Success Factors that typically determine success or failure. In this brief article, I summarise how we apply the evaluation ladder model to two types of initiatives - business support projects and skills projects. From our evaluation experience we have concluded:

• funded initiatives need to be ever smarter, based on continual testing

• the quality of funded projects has to increase, as resources diminsh

• we must know what works and what doesn’t - linkages at each project stage

• we need to demonstrate the *impact* of projects to secure future investments

***How can an evaluation ladder model help?***

With most funded initiatives, a significant period of time elapses between identification of business/skills needs and achieving impact. This contributes to a problem of cause and effect. Is performance improvement due to the project, or is it due to other causes - improvement in business processes, the economic climate, customer orders, other management practices? As these are difficult questions, they are sometimes avoided or simplistic approaches are adopted. This then results in too much **focus on the artifact**, (the project inputs, the advice given, the courses delivered, the project content) and insufficient understanding about the impact, the real reason for investing in projects. In this context, I have designed the evaluation ladder approach - the diagram shows firstly the **business support** evaluation ladder.

**The evaluation ladder - business support projects**

Business support is difficult to evaluate **in terms of impact** (the final rung), in part due to cause and effect factors mentioned. So projects need to establish causation.

These 7 steps are very largely sequential, involving testing in a particular sequence if the overall intervention is to succeed. Failure at any one of these key steps can cause the project to falter, sometimes creating a domino effect. Conversely, if each of the steps is robust, this creates a powerful business case that connects cause and effect. We can trace success from step one, through to step seven and so demonstrate with confidence the impact of the project. By evaluating at each ‘rung on the ladder’ we gain clear insights into what worked and what didn’t, at each stage. The project can then be enhanced in a pinpointed way - and the learning applied in future projects.

***Project teams can also use the evaluation ladder when they are designing a solution - using a pre-mortem approach, (what might go wrong?) based on existing evidence and past failures. ‘Testing’ is a good everyday word for this mindset. The project team should be open to testing of the assertion of market failure and the analysis of need, testing the initial project idea and the final proposal. If any failure then still occurs during implementation, it is identified as we go, tackled, and we go again.***

**The evaluation ladder - skills projects**

The skills project steps to be addressed are similar to business support projects - although patterns of recurring strengths and weaknesses within each step differ to a fair degree. I often run workshops to alert teams to the recurring patterns of helping and hindering factors at each step in various types of projects. There are, for example, strong patterns at step 1 on the ladder, which are about **demand** (Will the people come? Do they see and agree the market failure?); and marketing (How effectively is the project and its benefits sold?). If we are aware of recurring barriers, they can often be designed out. With business support projects, there can be issues in extending the benefit managers or SME owners gain, to other teams and then the rest of the workforce. If we know this, we can tackle it.

We should not generalise about evaluation tools. We custom design methods at each rung on the ladder - tailored, intelligent approaches are required in complex projects. There are some guiding principles though: (1) use a range of tools; evaluate processes as well as outcomes; value data/evidence and softer factors. (2) use interactive methods so you can have a dialogue with stakeholders; tick box, Survey Monkey type tools rarely obtain the depth of data needed. (3) connect findings (the evidence) with conclusions (interpretations of evidence) with recommendations. Most evaluations are weak on identifying the response…..the action stage. Above all, act.

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