



A STUDY OF THE DIGITAL STRATEGY DEVELOPMENTAL EVALUATION

What factors help and hinder the success of Developmental Evaluation in USAID, and what is its value to stakeholders?

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WILLIAM DAVIDSON INSTITUTE
AT THE UNIVERSITY OF MICHIGAN

**Search for
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TABLE OF CONTENTS

LIST OF ABBREVIATIONS AND ACRONYMS	2
ACKNOWLEDGMENTS	2
CONSORTIUM INFORMATION	2
SUGGESTED CITATION	2
EXECUTIVE SUMMARY	3
INTRODUCTION	6
METHODOLOGY	7
THE DIGITAL STRATEGY DE	8
OVERVIEW OF PHASES OF THE DIGITAL STRATEGY DE	9
TRANSITIONING FROM WORKING 100% TO 50% ON THE DE	9
USE OF DE PRINCIPLES IN THE DIGITAL STRATEGY DE	11
ROLE OF THE DE ADMINISTRATOR IN THE DIGITAL STRATEGY DE	11
EMBEDDING REMOTELY	12
HIGHLIGHTS OF THE DE	13
SUSTAINABILITY OF THE DE	15
PILOT FINDINGS	16
WHAT ARE THE BARRIERS AND ENABLERS TO IMPLEMENTATION OF DE IN THE USAID CONTEXT?	16
WHAT DO KEY STAKEHOLDERS CONSIDER TO BE THE VALUE OF CONDUCTING A DE COMPARED TO A TRADITIONAL EVALUATION APPROACH?	30
CONCLUSIONS	33
REFERENCES	35

LIST OF ABBREVIATIONS AND ACRONYMS

CDD	Center for Digital Development
CLA	Collaborating, Learning, and Adapting
DE	Developmental Evaluation
DEPA-MERL	Developmental Evaluation Pilot Activity-Monitoring, Evaluation, Research, and Learning
FY	Fiscal Year
ITR	Innovation, Technology, and Research
LER	Learning Evaluation and Research
PPL	Policy, Planning and Learning
Search	Search for Common Ground
USAID	United States Agency for International Development
WDI	William Davidson Institute at the University of Michigan

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CONSORTIUM INFORMATION

The DEPA-MERL consortium consists of Social Impact, the prime awardee; Search for Common Ground; and the William Davidson Institute at the University of Michigan.

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EXECUTIVE SUMMARY

PROGRAM BACKGROUND

The Developmental Evaluation Pilot Activity-Monitoring, Evaluation, Research, and Learning (DEPA-MERL) consortium—situated in Policy, Planning and Learning (PPL) and Learning Evaluation and Research (LER)'s Monitoring, Evaluation, Research, and Learning Innovations Program at the United States Agency for International Development (USAID)—is testing the effectiveness of developmental evaluation (DE) in the USAID context. DE was created to evaluate innovative programs that operate in complex environments and are thus expected to adapt over time. From May 2020 through May 2022, DEPA-MERL conducted a DE of USAID's Digital Strategy, which was launched in early 2020. USAID's Innovation, Technology, and Research (ITR) Hub, formerly the US Global Development Lab, is responsible for leading the strategy implementation. The Digital Strategy is focused on aligning the Agency's vision for development assistance with the world's evolving digital landscape. From May 2020 to June 2021, the DE supported four of the Digital Strategy's 17 implementation initiatives by providing insights into how the initiatives work within their teams and with each other, and by sharing timely data and input for decision-making. The DE was then extended through May 2022, allowing the consortium to broaden the DE's focus to work more across the Digital Strategy, in addition to focusing on a subset of initiatives. The extension also reduced the Developmental Evaluator's time from 100% to 50%.¹ As a result of the COVID-19 pandemic, for the first time at USAID, the Developmental Evaluator was embedded remotely. As the USAID team implemented the Digital Strategy, the DE helped them learn by collecting and sharing data to inform strategy and operations. The DE also helped them collaborate, as well as communicate the very ambitious and complex strategy to stakeholders.

EVALUATION BACKGROUND AND PURPOSE

DE is an evaluative approach aimed at facilitating continuous adaptation of interventions. In the context of this project, it involves having one or more Developmental Evaluators integrated into the implementation team, usually on a full-time basis. This report seeks to facilitate learning on the implementation of DEs in the USAID context by sharing results from the Digital Strategy DE. The intended audience of this report includes USAID stakeholders, organizations funding or implementing DE, and Developmental Evaluators themselves. Using the information collected, the DEPA-MERL consortium aims to build on existing literature and offer readers targeted data and guidance to improve the effectiveness of DE.

METHODOLOGY AND LIMITATIONS

During the entire duration (24 months) of the implementation of the Digital Strategy DE, the William Davidson Institute (WDI) team at the University of Michigan collected data to answer the following research questions:

- What are the barriers and enablers to implementation of DE in the USAID context?

¹ The reduction of her effort was so she could continue to support the DE for a longer duration than if she stayed at 100% effort.

- What do key informants consider to be the value (added or lost) of conducting a DE compared to a traditional evaluation approach?

To answer these questions, the WDI team used mixed methods. The WDI team conducted a document review, held semi-structured interviews with the Developmental Evaluator and stakeholders, and administered an electronic survey to stakeholders. Limitations of the study included selection bias and lack of a counterfactual.

FINDINGS

Throughout the DEPA-MERL DEs, the top barriers and enablers were consistent.ⁱⁱⁱ Given this was DEPA-MERL's fourth attempted DE, WDI investigated the top enablers and barriers across the DEs, which were also the top enablers and barriers in the Digital Strategy DE, to provide insights for future DE implementation within USAID.

In the report, the WDI team shares examples from the Digital Strategy DE of barriers and enablers associated with USAID dynamics, leadership, and skills of the Developmental Evaluator. The WDI team also shares recommendations based on how the Developmental Evaluator overcame barriers or ways others can mitigate such barriers in the future at USAID. Key takeaways are listed below by each research question.

What are the barriers and enablers to implementation of DE in the USAID context?

Data from interviews with the Developmental Evaluator and with stakeholders revealed the following:

1. Three main dynamics within USAID influenced the Digital Strategy DE: *bureaucratic processes, lack of clarity of decision-making power, and social norms*. A Developmental Evaluator's skill set can help overcome a number of barriers created by these dynamics within USAID. Additionally, making person-to-person connections within USAID can help overcome barriers to DE created by bureaucratic processes.
2. USAID's learning-oriented and collaborative culture is a strong enabler of DE. At the same time, there are norms (such as annual slowdowns, too many meetings, and limited trust of outsiders, among others) that can slow down DE activities, making it difficult for the Developmental Evaluator to build relationships and become embedded in the program. There are also information preferences such as a preference for quantitative data (compared to qualitative data) that can serve as barriers to data sharing and utilization.
3. DE champions within USAID have the following characteristics: genuine openness to learning, collaboration, understanding, and willingness to convey USAID dynamics to the Developmental Evaluator, understanding the technical aspects of the DE, and investing in the success of DE within the USAID context.

What do key informants consider to be the value (added or lost) of conducting a DE compared to a traditional evaluation approach?

A survey was distributed to stakeholders involved in the DE to assess its value. Based on the analysis, which included responses from five stakeholders, the WDI team found the following:

1. Overall, respondents reported positive interactions with the Developmental Evaluator. One hundred percent (n = 5) of respondents reported that they always felt comfortable sharing information with the Developmental Evaluator and that the Developmental Evaluator always understood the challenges they faced and always provided them with timely information.
2. Generally, survey respondents reported that the Digital Strategy DE was more valuable than a traditional evaluation. One hundred percent of respondents reported that DE was much better when compared to traditional evaluation as it relates to time savings (n = 4; one person did not respond to the question), providing timely feedback (n = 5), and facilitating adaptations (n = 5) to the program.
3. One hundred percent (n = 4) of respondents would like to see continued use of DE within USAID, and 100% (n = 4) of respondents would recommend the DE approach to other organizations.

CONCLUSION

The main goals of the DE were met. Those goals included helping those who were implementing the Digital Strategy learn as they went along, as well as collaborate and communicate across what was a very ambitious and complex strategy. The Developmental Evaluator accomplished this by working one-on-one with initiative leads to inform innovations and strategic decision-making, as well as identifying and implementing strategic activities that cut across the initiatives. The Digital Strategy DE demonstrates that DEs can design and implement solutions that increase communication and coordination across USAID.

INTRODUCTION

THE DEVELOPMENTAL EVALUATION PILOT ACTIVITY

Managers of programs being implemented in complex settings or with untested theories of change often face a challenge when trying to use a traditional midterm or end-term evaluation to assess the program’s impact. In such programs, traditional evaluations² may fail to provide useful information in a timely fashion or capture important outcomes not defined at the outset. To help address this issue, the United States Agency for International Development (USAID) funded the Developmental Evaluation Pilot Activity—Monitoring, Evaluation, Research, and Learning (DEPA-MERL) program—a mechanism to pilot the use of developmental evaluation (DE) and assess its feasibility and effectiveness in the USAID context. DEPA-MERL is an initiative under the PPL’s Monitoring, Evaluation, Research, and Learning Innovations Program and is implemented by Social Impact (prime awardee), Search for Common Ground (Search), and the William Davidson Institute (WDI) at the University of Michigan.

DE is an evaluative approach aimed at facilitating continuous adaptation of interventions. In this context, it involves having one or more Developmental Evaluators integrated into the implementation team, usually on a full-time basis. These Developmental Evaluators contribute to modifications in program design and targeted outcomes throughout implementation. They participate in team meetings; document decisions, processes, and dynamics; and collect and analyze data, feeding it back to the program on a regular basis. The DE approach is methodologically agnostic and utilization focused. Developmental Evaluators adjust research questions and methodological and analytic techniques as the project changes and deliver contextualized and emergent findings on an ongoing basis.

THE DEPA-MERL LEARNING AGENDA

The WDI team’s role in the DEPA-MERL consortium is to facilitate learning on the implementation of DEs in the USAID context. To accomplish this objective, the WDI team analyzed the Digital Strategy DE during its 24-month duration, from May 2020 through May 2022. Using the data collected, the DEPA-MERL consortium aims to build on existing literature focused on the practice of DE.ⁱⁱⁱ Readers of this report—including USAID stakeholders, other organizations implementing DE, and Developmental Evaluators themselves—can use the data and recommendations to strengthen their own use of this approach. Additionally, the findings from this study will be compared to findings from other pilots conducted by DEPA-MERL.^{iv} A comparative report is forthcoming in 2024.

FOCUS AREAS OF THIS REPORT

This report discusses evaluation results from the DEPA-MERL consortium’s learning agenda, led by the WDI team. This report includes an overview of the DE followed by a detailed analysis of barriers and enablers to DE implementation. Finally, the report shares stakeholders’ perceptions of the value of DE and concludes with recommendations.

² For the purposes of this study, “traditional evaluation” refers to any formative or summative evaluation approach. This includes evaluations that measure the difference between pre- and post-program activities on a subset of the population that receives a treatment or intervention, or “one-off” evaluations that provide a snapshot or cross-sectional analysis of a program.

METHODOLOGY

The WDI team used mixed methods to understand the effectiveness of the DE approach, how it can be strengthened in practice, and what value it provides for its stakeholders within the USAID context.^v **Table I** lists the research questions developed by the DEPA-MERL consortium and the associated data collection methods.

Table I: DEPA-MERL Assessed the Digital Strategy DE Based on Two Research Questions Using a Mixed-Methods Approach

Research Question	Methods	Data Sources
What are the barriers and enablers to implementation of DE in the USAID context?	Semi-structured interviews (qualitative)	<ul style="list-style-type: none"> Monthly reflection interviews with the Developmental Evaluator (20 monthly interviews) Interviews with keys stakeholders at end line (n = 3)
What do key stakeholders consider to be the value (added or lost) of conducting a DE compared to a traditional evaluation approach?	Survey (quantitative and qualitative)	<ul style="list-style-type: none"> Value of DE survey with stakeholders at end line (n = 5)

The WDI team conducted over 23 hours of interviews and analyzed over 350 pages of qualitative data. Outside of DEPA-MERL, research of this kind—a systematic evaluation of DE—has been conducted only in a handful of other instances.^{vi,vii,viii}

METHODS AND DATA TREATMENT

To answer the first research question, *What are the barriers and enablers to implementation of DE in the USAID context?*, WDI conducted monthly reflection and key stakeholder interviews. During the interviews, the WDI team asked open-ended questions about factors that the interviewees experienced or faced that were particular to the program and/or owing to the local context. The WDI team used NVivo software and conducted line-by-line coding³ of interview transcripts for barriers and enablers. The WDI team ensured inter-coder reliability of 80%–90% on all codes or factors. Before the launch of the Digital Strategy DE, the WDI team conducted a literature review to identify 13 factors that could influence the implementation of DE (using a deductive approach). The WDI team also identified and added new factors by using an inductive approach to carefully review the incoming data.

To answer the second research question, *What do key informants consider to be the value (added or lost) of conducting a DE compared to a traditional evaluation approach?*, the WDI team distributed the Value of Developmental Evaluation Survey to 26 key stakeholders ahead of the DE Wrap-Up Learning Session, of which five responded fully or partially. The Developmental Evaluator identified stakeholders who should receive the survey based on their role in the Digital Strategy DE, with the objective of selecting persons

³ Coding is an analytical process in which data, in qualitative form (such as interview transcripts), are categorized to facilitate analysis. See Miles et al. (2014).

from different initiatives and different levels of involvement within the Digital Strategy DE.⁴ The data were analyzed using Qualtrics and Microsoft Excel software.

LIMITATIONS OF THE STUDY

The WDI team faced challenges in collecting data during the Digital Strategy DE. These are related to the following:

- **Selection bias:** Because of resource constraints, the WDI team could not interview all DE stakeholders. Instead, when identifying interview participants, the team used purposive sampling to select a few stakeholders who had robust knowledge of the Digital Strategy DE. To reduce the possibility of selection bias, the WDI team worked with the Developmental Evaluator to co-select individuals who would have both positive and negative perceptions of the Digital Strategy DE. While perspectives from interview respondents are included in this report, the majority of the information in the report is from the Developmental Evaluator's perspective. Whenever possible, the WDI team triangulated the Developmental Evaluator's perspective with information shared in interviews with other key stakeholders.
- **Lack of a counterfactual:** There was no counterfactual available for this study. As an alternative, the WDI team triangulated data through verification from multiple sources and conducted ongoing data collection to reduce recall bias.
- **Small survey sample size:** A small number of individuals responded to the survey associated with our research question *What do key informants consider to be the value (added or lost) of conducting a DE compared to a traditional evaluation approach?* The small sample limits the external validity (i.e., generalizability) of the findings from the survey.

THE DIGITAL STRATEGY DE

In early 2020, USAID launched its Digital Strategy to align the Agency's vision for development assistance with the world's evolving digital landscape. The Technology Division (first known as the Center for Digital Development (CDD)) within USAID's Innovation, Technology, and Research (ITR) Hub, formerly part of the US Global Development Lab, is responsible for leading the implementation of the Digital Strategy. From May 2020 to May 2022, DEPA-MERL conducted a DE of USAID's Digital Strategy. Because of the COVID-19 pandemic, the Developmental Evaluator was embedded remotely.

Several factors made DE a good fit for the Digital Strategy:

- The nascent nature of some parts of the strategy, as well as the uncertain direction of particular aspects of the initiatives, provided an opportunity for embedded learning to guide implementation.
- The Digital Strategy's need to adapt, test, and promote new programming, all while the digital landscape continues to quickly evolve.

⁴ The DEPA-MERL consortium validated this list of stakeholders, but it was not reviewed by any stakeholders themselves.

- The need to work across USAID, as well as with numerous initiatives to develop, refine, and implement the Digital Strategy.

OVERVIEW OF PHASES OF THE DIGITAL STRATEGY DE⁵

From May 2020 to June 2021, the DE supported four of the Digital Strategy's 17 implementation initiatives by collecting data to inform strategy, operations, and learning, as well as help the initiatives collaborate and communicate across what was a very ambitious and complex strategy. The four digital initiatives included Digital Ecosystem Fund, Digital Payments, Digital Skills, and Digital Literacy.

In July 2021, the DE was extended through May 2022, allowing the DE's focus to be broadened further across the Digital Strategy, in addition to focusing on a subset of initiatives. The extension also reduced the Developmental Evaluator's time from working 100% on the DE to working 50% on the DE. The reduction of her effort was so she could continue to support the DE for a longer duration than if she stayed at 100% effort. In both phases, the Developmental Evaluator was supported by the DE Administrator. The DE Administrator role was fulfilled by Social Impact staff.

The COVID-19 pandemic forced the DE transition to a fully virtual format. The most difficult aspect of the virtual environment was embedding remotely. Otherwise, the DE was able to adapt easily to the virtual work environment. For instance, instead of holding a multiday or multihour acculturation workshop, the Developmental Evaluator significantly shortened the acculturation workshop duration and used the technologies (such as using the white space of Google slides as a whiteboard for group work) to allow attendees to engage seamlessly and work together virtually. She also helped the Digital Literacy initiative think through how to set up and facilitate the Digital Literacy working group meetings virtually so participants found the meetings useful and meaningful.

TRANSITIONING FROM WORKING 100% TO 50% ON THE DE

In July 2021, the Developmental Evaluator shifted from working 100% to 50% on the DE. In this section, details describing the Developmental Evaluator's experience with this transition are shared to help inform other DEs that may be thinking about or planning to undergo a similar transition.



Scope of Work: The DE scope of work was revisited for the transition, and some of the objectives were made more general so the Developmental Evaluator could be approached by other teams and no longer be restricted to the original four digital initiatives. Originally, everyone thought it was a good idea, but shortly after the transition began, the Developmental Evaluator was approached with a number of requests which required her to set more precise parameters related to the DE's focus. By the third month of working on the DE 50% of the time, she wished that the scope only had included overarching or cross-cutting activities, as there was more than enough for her to do at that level, and at that point in time, she was only working with two of the four original initiatives.

⁵ For a more comprehensive list of activities completed by the Digital Strategy DE, please see the final report written by the Developmental Evaluator entitled Digital Strategy Developmental Evaluation: Final Report, May 2022 which can be found on the DEPA-MERL webpage (<https://www.usaid.gov/PPL/MERLIN/DEPA-MERL>)



Delegating Time: Originally the Developmental Evaluator had thought about trying to delegate certain days of the week for the DE, but she found early on that such a format did not work, as it was difficult to contain her DE and non-DE work to specific days. She also had considered reserving mornings for the DE because of her other non-DE work commitments. However, she found limiting herself to working on the DE in the mornings was not realistic if she needed to attend the initiative lead's biweekly meetings.

During the first month of the transition, the Developmental Evaluator was able to accommodate the extra demands on her time from increased requests for DE activities, as the other 50% of her non-DE work had not ramped up yet. However, the following month, her non-DE work became demanding, and as a result, she reflected she may have worked more slowly on the DE because of when she had time to schedule work or meetings. Perhaps serendipitously the transition occurred near an annual slowdown at USAID (i.e., August), so although a lot of requests came in as she transitioned, because of the slowdown and the Developmental Evaluator's own paid time off, new requests decreased during the second month of working on the DE 50% of the time.



Shifting Gears: In the sixth month of working 50% on the DE, the Developmental Evaluator shared she was finding it increasingly challenging to shift gears between the DE and non-DE work, especially since her non-DE work was with ITR as a hub. She found herself really missing working full time on the DE. It also made her reflect that if the DE had been scoped at 25% instead of 50% time, the DE would have likely fallen to the bottom of her to-do list for a good portion of the time, and she would not have had enough concentrated time to make adequate progress on the DE.



Connection: The Developmental Evaluator was not able to be as proactive as she used to be when she was working full time on the DE regarding suggesting things or offering to do things for people. As a result, she felt less connected to people in the DE and the DE overall because she felt her allegiance and attention had been pulled toward the non-DE work. She reflected that when she worked full time on the DE and was immersed, things would occur to her or she'd remember to follow up – and although she could not point out moments where she had not done those things, she shared that it did feel different working 50% on the DE.

Additionally, at the time of the transition, the Digital Strategy lead also began attending fewer meetings, so the Developmental Evaluator found because she also was attending fewer meetings due to working 50% on the DE, she was less connected to the Digital Strategy lead as well. The Developmental Evaluator found herself hearing information secondhand and thus felt she had lost some of the situational awareness and relationships that were more tangential to her core work on the DE. Because of events in her private life, the Developmental Evaluator also had to take a good amount of time off starting in month 8 of working 50% on the DE, which resulted in her feeling even less connected.

Given the Developmental Evaluator's experience from working 100% and 50% on the DE, she would not recommend anyone starting a DE at 50% time. The complexity of learning about the Digital Strategy and the roles and responsibilities of those involved would have taken much longer if she had been only 50% at the start of the DE. However, extending the DE at 50% allowed the Developmental Evaluator to

arrange for and then track the handover of learning and the uptake of various DE activities for longer than would otherwise have been possible.

USE OF DE PRINCIPLES IN THE DIGITAL STRATEGY DE

The Developmental Evaluator did not consciously or regularly refer to the DE principles⁶ to inform the DE; rather, she reported that the principles were internalized into everything she did. The most frequently mentioned DE principles shared by the Developmental Evaluator during the monthly interviews included complexity perspective, co-creation, and systems thinking. For example, during the November 2020 monthly interview, she shared that as an anthropologist, she used systems thinking and considered complexity in how she approached everything. In February 2021, she reflected that the Digital Strategy initiatives operated within numerous systems (the Mission, headquarters, and implementing partners), which created varying levels of complexity. In May 2021, she described the Digital Strategy initiatives as a matrix within a complex bureaucracy.

DE principles she referred to the least included developmental purpose, innovation niche, and evaluation rigor. In November 2020, she recognized that one of the main purposes of the DE was to support the Digital Strategy in innovating how USAID operates digitally. In May 2021, she shared that she had received positive feedback on the Key Issue Narrative Analysis for conducting a thorough, rigorous analysis.

Interestingly, one of the DE stakeholders was not familiar with the DE principles until the Developmental Evaluator shared them with her during the eighth month of the DE. The USAID stakeholder was struck by the overlap between the Digital Strategy and DE principles. She suggested that the DE principles should be incorporated into future scopes of work.

ROLE OF THE DE ADMINISTRATOR IN THE DIGITAL STRATEGY DE

The DE Administrator helped scope and staff the DE and provided administrative and technical support throughout the DE. Prior to the start of the DE, the DE Administrator worked with USAID to develop a preliminary scope of work and budget, as well as recruit the Developmental Evaluator.

During the DE, the DE Administrator was responsible for managing the DE, such as overseeing the budget, contracts, timelines, and liaising with the funder. The DE Administrator also worked with the Developmental Evaluator to provide surge support as needed for DE technical tasks, such as qualitative coding and workshop facilitation. The DE Administrator was also available to fill any gaps in the Developmental Evaluator's skills since it can be difficult for one person, even a seasoned Developmental Evaluator, to have all the skills needed to conduct a DE. For instance, during the DE, the DE Administrator identified another staff member at SI to provide technical support on the Digital Development Network Analysis on behalf of the Developmental Evaluator.

Beyond offering technical support, the DE Administrator also held routine meetings with the Developmental Evaluator to serve as a sounding board for thinking through complex and emergent issues. The Developmental Evaluator also shared that the monthly interviews with the WDI team served

⁶ The DE principles include developmental purpose, evaluation rigor, utilization focus, innovation niche, complexity perspective, systems thinking, cocreation, and timely feedback

as a valuable opportunity for the Developmental Evaluator to step back, reflect on the DE, and see the bigger picture. Outside of these meetings, the Developmental Evaluator also reached out to the DE Administrator whenever she needed to get additional feedback and input on ideas and products.

Additionally, the DE Administrator provided a managerial role in the DE, which included working with the USAID before the start of the DE to develop the preliminary scope of work and budget for the DE, as well as recruit the Developmental Evaluator.⁷ During the DE, the DE Administrator helped to ensure adherence to the budget, timelines, and contracts; conducted quality assurance; oversaw reporting to USAID; and oversaw conversations related to extending the DE. The DE Administrator was also available to serve as an intermediary to help problem solve any management challenges.

EMBEDDING REMOTELY

Because of the COVID-19 pandemic, the Developmental Evaluator had to embed remotely. Since the DE began early in the pandemic, there were not many lessons learned at that point around how to work effectively virtually or around embedding remotely; as a result, the Developmental Evaluator had to navigate embedding virtually with little guidance. With that stated, early on in the pandemic, everyone faced new challenges of adapting to a fully virtual environment. The Developmental Evaluator attributed the fact that she had a usa.gov email address at the start of the DE to helping her embed quickly, as it helped people within USAID see her as an insider. Similar to previous DEs, as people became more familiar with the Developmental Evaluator, they increasingly pulled her into meetings and included her as a copied recipient on emails. Indeed, the Developmental Evaluator attributed the openness of key DE stakeholders to providing access to documents and meeting invitations early on to helping her embed.

The Developmental Evaluator reflected that a challenge to embedding remotely was the loss of tacit knowledge as “*there is no substitution for walking around an office.*” To remedy this, she would join Zoom meetings early and stay after they ended to hear some of the informal conversations.⁸ Despite the Developmental Evaluator’s interest in getting to know DE stakeholders more deeply and having a desire to meet one-on-one, as she embedded, she was careful to take into consideration the Agency’s efforts to try to limit meetings since a lot of staffers were parents responsible for overseeing their children’s education during school shutdowns. One of the only communication challenges that arose was when the Developmental Evaluator became aware that a lot of communication was occurring through informal channels (e.g., Google chat) that she was not included in. Upon realizing this, the Developmental Evaluator requested that DE stakeholders do their best to convey relevant information to her discussed through Google chat. Overall, the Developmental Evaluator reflected that operating remotely was a barrier to the DE implementation at the start, but with time, as staff adjusted to the virtual environment, it no longer affected the DE negatively. The virtual setup did not serve as an enabler at any point in time.

⁷ DEPA-MERL’s [Implementing Developmental Evaluation: A Practical Guide for Evaluators and Administrators](#) includes step-by-step guidance for designing a DE (including developing a job description for a Developmental Evaluator and selection criteria to consider) while our [Developmental Evaluation in Practice: Tips, Tools, and Templates](#) handbook includes detailed guidance on how to recruit for DEs, including interview questions for this position.

⁸ This strategy and others for conducting remote DEs can be found in the [Remote Developmental Evaluation Guide for Funders and Practitioners](#).

Figure I. Developmental Evaluator Most Proud of Each Month

2020	AUGUST	NETWORK MAPS Provide insights for DE initiative leads	
	SEPTEMBER	ACCULTURATION WORKSHOPS Cocreated questions for the DE to explore	
	OCTOBER	MINI-PRODUCTS (SURVEY DRAFT, INTERVIEW PROTOCOL, CHART) Kept the DE moving and coordinated	
	NOVEMBER	FIRST QUARTER REFLECTIONS Provided first set of recommendations based on observations during the DE	
	DECEMBER	RECEPTIVITY OF DE STAKEHOLDERS Observed increase in understanding of DE stakeholders in how to engage with the DE as well as an increase in stakeholder buy-in for the DE	
	JANUARY	CONNECT + REFLECT SESSION Engaged stakeholders in sharing information across initiatives	
	FEBRUARY	CONNECT + REFLECT SESSIONS Provided opportunity for stakeholders to brainstorm and share information	
	MARCH	CONNECT + REFLECT SESSION Increased awareness of the benefit of this type of meeting	
	APRIL	KEY ISSUE NARRATIVE ANALYSIS Shared and used information collected by USAID and analyzed through the DE	
	MAY	KEY ISSUE NARRATIVE ANALYSIS Used by the Vice President's work in the Northern Triangle of Central America	
	JUNE	KEY ISSUE NARRATIVE ANALYSIS Developed high- and low-touch methods for USAID staff to continue conducting these analyses in the future	
	2021	JULY	FACILITATION OF WORKSHOP Facilitated academics and practitioners from around the globe
AUGUST		CONNECT + REFLECT SESSION Discussed meeting effectiveness and need for change	
SEPTEMBER		CONTINUED RELATIONSHIPS Continued engagement with initiative leads	
OCTOBER		DIGITAL DEVELOPMENT NETWORK SURVEY Clearance of survey for social network analysis	
NOVEMBER		DIGITAL DEVELOPMENT NETWORK SURVEY Received a good number of survey responses and started analysis	
DECEMBER		DIGITAL DEVELOPMENT NETWORK ANALYSIS Progressed digital development network survey analysis and started initial development of Kumu maps	
JANUARY		DIGITAL DEVELOPMENT NETWORK ANALYSIS Helped expand the network at the same time that it's making the network visible	
FEBRUARY		DIGITAL DEVELOPMENT NETWORK ANALYSIS Metrics and maps from the analysis are found useful by key stakeholders	
2022		MARCH-MAY	LEARNING SESSIONS Held individual learning sessions with each initiative lead as well as a combined learning session for all those involved in the DE to discuss accomplishments and continuation of activities after the DE ends

HIGHLIGHTS OF THE DE⁹

Throughout the DE, the Developmental Evaluator captured, promoted, and enabled the utilization of emergent learnings to support the DE. Key activities and outputs of the DE are featured in **Figure I**, which highlights what the Developmental Evaluator was most proud of each month. The list begins with the network maps, which were the first product the Developmental Evaluator created during the DE. The Developmental Evaluator met and interviewed a number of DE stakeholders to understand the different USAID staff and contractors involved in the Digital Strategy, including which individuals were involved in multiple digital initiatives. The network maps were shared with key DE stakeholders, which helped users see how disconnected some initiatives were from others and which individuals were connected to multiple initiatives and thus might be informative Digital Strategy sources (but also may be stretched thin). The maps also were used to help orient new hires on the organization of the Digital Strategy initiatives.

Another key output of the DE included the Connect & Reflect sessions. The Developmental Evaluator's observations of how disconnected initiatives were from one another resulted in the recommendation for and then implementation of weekly 30-minute Connect & Reflect sessions where Digital Strategy staff crowdsourced solutions to a particular challenge or shared more about their work to find synergies and encourage collaboration between the digital initiatives. The Connect & Reflect sessions increased communication and coordination across the Digital Strategy initiatives. They also helped initiatives think about their relationship to one another. For example, the Digital Payments initiative lead conducted an interactive session during one of the Connect & Reflect sessions in which attendees shared how their initiatives could intersect with Digital Payments or amplify what they were doing. The Developmental

Evaluator reported that “*in eight minutes, a phenomenal amount of connections were made,*” and given that a number of decision-makers were on the call, the session resulted in an offer to include questions related to Digital Payments in the Digital Ecosystem Country Assessments moving forward, something the initiative had been trying to do without much success prior to the call. Additionally, the digital initiative leads internalized some of the writing and brainstorming activities used in the Connect & Reflect sessions and used them in their own meetings.

Another key activity during the DE was a review of USAID Key Issue Narratives to better understand digital programming in Missions. The Developmental Evaluator developed a coding scheme and elicited support from the DE Administrator to complete the coding. The Developmental Evaluator presented and shared findings from the analysis with various USAID groups and used their feedback to inform additional analyses. Beyond serving the needs of the Digital Strategy, the Key Issue Narrative Analysis has been used by a number of other USAID entities from the National Security Council to the Administrator’s Office and other groups. For instance, the Administrator’s Office wanted to better understand the type of digital programming used in the Northern Triangle region of Honduras, El Salvador, and Guatemala. The Developmental Evaluator was able to quickly pull the relevant information from her analysis. It was included in an informational document that the heads of the Digital Strategy presented to the Vice President. The Developmental Evaluator also worked with key DE stakeholders to rewrite the Key Issue Narrative instructions for Fiscal Year (FY) 2021. She also conducted the Key Issue Narrative Analysis for FY 2021. She adapted the process based on learnings from the previous year. Changes included streamlining codes to be more targeted toward data utilization. The Developmental Evaluator shared the findings from the FY 2021 analysis at the end of the DE.

The final key activity of the DE was conducting a Digital Development Network Analysis of individuals across the Agency working in digital development. The total sample consisted of 105 people, who listed a total of 705 staff members, working groups, and external organizations related to digital development work, among whom there were 1,628 connections. The Developmental Evaluator held a learning session for people to comment on the analysis. It was also circulated to the rest of the Technology Division beyond the Digital Strategy. The head of the Technology Division sent it out in an email that stated there are a lot of possible uses for the analysis. Indeed, the Digital Development Network Analysis identified and improved digital connections within the Digital Strategy and across the entire Agency. For example, the analysis showed that the Technology Division staff was not as well connected to other USAID/Washington Bureaus or overseas Missions as would be necessary to implement the Digital Strategy successfully. The analysis helped illustrate something that the Agency likely was aware of: USAID Digital Strategy initiatives need to improve outreach to Missions and maintain engagement with other Bureau colleagues. The map was also helpful for assessing what gaps are created in the network when someone leaves.

Beyond these key activities, the initiative leads reported that their one-to-one meetings with the Developmental Evaluator were a valuable part of the DE. In the meetings, they discussed tasks they were working on together through the DE. The meetings provided initiative leads the opportunity to step

⁹ For a more comprehensive list of activities completed by the Digital Strategy DE, please see the final report written by the Developmental Evaluator entitled *Digital Strategy Developmental Evaluation: Final Report, May 2022* which can be found on the DEPA-MERL webpage (<https://www.usaid.gov/PPL/MERLIN/DEPA-MERL>)

back and reflect, something that is rare across USAID and especially for those with many other responsibilities. The initiative leads found it helpful to be able to “think out loud” with the Developmental Evaluator, bounce ideas off of her, and hear her perspective, constructive criticism, and guidance. The leads cherished the meetings because they allowed them to dig into some of the strategic activities they wanted to do but did not have the time to focus on frequently.

Stakeholders of the DE reported that the main goals of the DE were met. Those goals included helping those who were implementing the Digital Strategy learn as they went along by collecting and sharing data to inform strategy and operations and to help them collaborate and communicate across what was a very ambitious and complex strategy. Some stakeholders also reported that the DE exceeded their expectations.

SUSTAINABILITY OF THE DE

During the Developmental Evaluator’s transition to working 50% on the DE, she started meeting more with the two individuals likely to take over her work once the DE ended—the Monitoring and Evaluation Advisor for the Digital Strategy, as well as the Monitoring and Evaluation Program Officer for the Technology Division. Additionally, the Developmental Evaluator conducted one-on-one meetings with initiative leads and a final learning session with key DE stakeholders to discuss accomplishments and next steps.

As part of the transition, in September 2021, the Monitoring and Evaluation Advisor for the Digital Strategy took over as facilitator of the Connect & Reflect sessions. After the facilitator role shifted, over time, there was a small decrease in attendance at the sessions, but attendance was still strong at the end of the DE, with no plans to stop the sessions. During the final learning session, stakeholders noted they should rethink whether the audience for the sessions should only include initiative leads or a wider audience. Currently, about two thirds are from the Technology Division.

Both the Monitoring and Evaluation Advisor for the Digital Strategy and the Monitoring and Evaluation Program Officer for the Technology Division expressed interest in continuing the Digital Development Network Analysis. The Monitoring and Evaluation Advisor for the Digital Strategy was interested in using it as an annual metric, while the Monitoring and Evaluation Program Officer for the Technology Division was interested in conducting more participatory stakeholder mapping exercises in the future. A challenge to replicating the Digital Development Network Analysis in the future is that the Developmental Evaluator used Kumu (a platform for mapping people, systems, and concepts), which is not approved for use by USAID. Thus, access to the previous analyses will rely on the Developmental Evaluator keeping her Kumu account. During the final learning session, there was discussion about not using surveys to conduct the analysis in the future since response rates to surveys are low at USAID, and because contractors tend to analyze survey data, it can result in the data not being internalized as much as it could be by USAID staff since they don’t spend as much time with the data.

The Monitoring and Evaluation Program Officer for the Technology Division also expressed interest in continuing the Key Issue Narrative analyses. A challenge to this is that the previous analyses were conducted using Dedoose, a platform for analyzing qualitative and mixed-methods research. Dedoose is not approved for use within USAID, so the Developmental Evaluator will need to keep her paid account active for USAID staff to have continued access to the files. Given USAID staff’s inability to have their

own Dedoose project or subscription account, the Developmental Evaluator discussed alternatives to using Dedoose to analyze the Key Issue Narratives in the future such as using a spreadsheet or holding a hackathon.

Additionally, to contribute to the sustainability of the DE, an American Association for the Advancement of Science & Technology Policy Fellow drafted a research and learning plan for the Digital Ecosystem Fund team that included a number of activities the Developmental Evaluator started with the team. The plan organizes these activities into actions and an associated timeline with responsibilities.

In an attempt to ensure USAID staff retain access to files she created throughout the DE, the Developmental Evaluator included links to the files in her final report. She also added a note to Google documents she owned that stated, “Please contact me at my Social Impact email address if you need something related to the document.” The Developmental Evaluator also resent the links to all the people who currently have access to the files to remind them they have access and let them know that they cannot relocate or move the files, but they can add another—essentially a shortcut on their own drive so it is somewhere more obvious to them if they need it in the future.

In her final report, the Developmental Evaluator also made the recommendation to hire or assign a full-time permanent learning advisor either internal to USAID (preferred) or a contractor to assist with continuing the DE activities. This recommendation resulted from a recognition of the fact that the individuals mentioned above have full-time positions and the aforementioned DE activities are an additional responsibility they would need to take on, which could result in the de-prioritization of DE activities given how busy USAID staff already are.

PILOT FINDINGS

Findings and associated key takeaways are organized by the two research questions in this report.

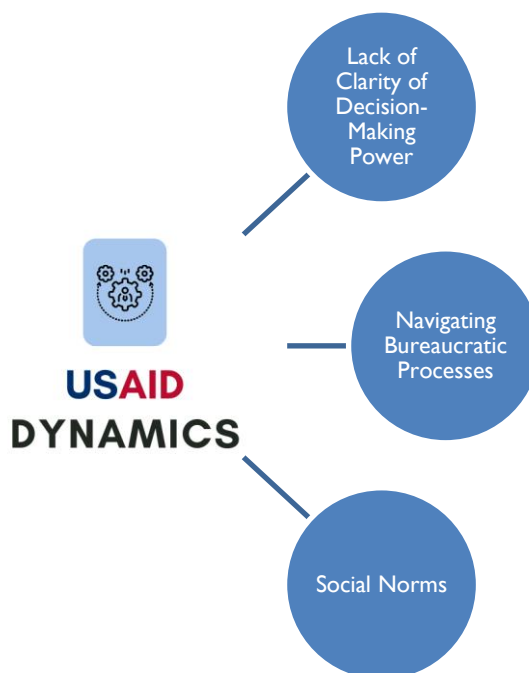
FINDINGS FOR RESEARCH QUESTION: WHAT ARE THE BARRIERS AND ENABLERS TO IMPLEMENTATION OF DE IN THE USAID CONTEXT?

The top two barriers our DEs have encountered are the effect of USAID dynamics and the influence of leadership on the DE. The top enabler across our DEs has been the skills of the Developmental Evaluator. Throughout the DEPA-MERL DEs, the top barriers and enablers were consistent.^{ix,x} Given this was DEPA-MERL’s fourth attempted DE, we decided to further investigate the top enablers and barriers across the DEs (which were also the top enablers and barriers in the Digital Strategy DE) to answer this research question more deeply to provide insights for future DE implementation within USAID. Thus, in the following section, we share examples from the Digital Strategy DE of barriers and enablers associated with USAID dynamics, leadership, and skills of the Developmental Evaluator.

USAID DYNAMICS

To more deeply understand the effect of USAID dynamics on DE implementation, we conducted secondary coding of the “USAID dynamics” code. Three main themes emerged during secondary coding: lack of clarity of decision-making power, navigating bureaucratic processes, and social norms (see **Figure 2**).

Figure 2: USAID Dynamics Subcodes



Next, we provide examples of barriers and enablers within each of the three themes noted in **Figure 2** associated with USAID dynamics. Based on how the Developmental Evaluator overcame barriers associated with each of these themes we also share recommendations or ways others can potentially mitigate such barriers in design or implementation of future DEs within USAID. Please note that since these recommendations are based on a single DE, we advise that readers do not overly generalize them, but rather carefully consider them based on the context in which they hope to or are currently implementing DE. Thus, we share these recommendations in an effort to further learning and improve DE design and implementation within USAID.

Effect of Lack of Clarity of Decision-Making Power on the DE

Early in the DE in August 2020, the Developmental Evaluator observed situations where there was a lack of clarity of roles, which created uncertainty and tension around decision-making. The Kumu network maps the Developmental Evaluator developed of the Digital Strategy showed that there were six or seven standing teams with a cross-cutting matrixed Digital Strategy set of initiatives. Seventeen of these initiatives were superimposed on top of the standing teams. In some initiatives, the initiative team lead's supervisor was the only other direct-hire member, which caused structural ambiguity. Additionally, some of the Digital Strategy initiatives were involved in things that were already being done by one of the standing teams. As a result, some structural ambiguities and inefficiencies resulted in individuals, including initiative leads, feeling like they did not have the authority to make decisions. It also created a challenge of who a contractor should listen to within an initiative. When delays in decision-making affected the

DE, it helped that the DE was designed to work with four Digital Strategy initiatives so that when there were decision-making delays in one initiative, the Developmental Evaluator could focus on the other initiatives.

The structural inefficiencies were further complicated by USAID's complex staffing structure and use of a range of different types of contractors and consultants within the initiatives. Three of the initiatives were staffed with only one full-time staff member, which required a heavy reliance on contractors. Sometimes contractors from different implementing partners were assigned different pieces of the same overall project, leading to communication and collaboration challenges. The Developmental Evaluator shared that there appeared to be a hierarchy of non-direct-hire staff with direct-hire Foreign Service Officers at the top, followed by direct-hire general service civil servants, then full-time embedded institutional contractors, and finally non-embedded contractors and consultants. Although the contractors often lacked decision-making authority because of this hierarchy, they tended to be more knowledgeable because they spent more time on the initiatives given direct hires' limited bandwidth. The wide use of contractors influenced the DE in subtle ways, such as the Developmental Evaluator's work being put on hold when initiative leads needed to finish time-bound work with contractors. The Developmental Evaluator proposed potential solutions to help address the challenges of working with a large number of contractors in her First Quarter Reflections in November 2020. These suggestions included enabling frequent communication and coordinating with contractors from different implementing partners, as well as identifying opportunities for consistency across tasks, either by adding full-time staff or assigning a single contractor to an entire project whenever possible.

Recommendations: (1) When a DE is expected to work across a large program or the Agency, consider designing the DE to work across USAID teams/initiatives so that when DE activities are affected by delays in decision-making, contractor timelines, or other bureaucratic processes, the DE can shift focus to another USAID team/initiative. (2) When a contractor's work may affect the DE's ability to conduct activities, enable frequent communication and coordination to avoid delays.

After identifying these challenges early in the DE, the Developmental Evaluator implemented two solutions, the Connect & Reflect sessions and the Digital Development Network Analysis. Despite these solutions being put in place, the Developmental Evaluator and key DE stakeholders continued to note challenges resulting from structural tensions throughout the DE. In May 2021, the Developmental Evaluator noted that a solution was proposed to transfer oversight of the implementation of some of the Digital Strategy initiatives from the Digital Strategy leadership team to the Technology Division team leads, and by November 2021, she reported that some of the initiatives had in fact been returned to the managers for implementation and would no longer be under the Digital Strategy lead's direct supervision or control. During an open topic Connect & Reflect in early 2022, however, a number of attendees were unaware of the fact that the management of the Digital Strategy initiatives had been reorganized. As a

result, notes from the session were sent to management, and management led the next Connect & Reflect to explain the management changes.

Other USAID dynamics also influenced the DE in subtle ways during the USAID Transformation as the Global Development Lab was dismantled. The division's name changed from CDD to Innovation, Technology, and Research/Technology (ITR/T) to Technology Division, and during that time, a rescoping occurred of what counts as work for the Digital Strategy and what work falls outside that scope. Some staff members reported hearing rumors that they might have to compete for their existing jobs. They were told that no one would lose their jobs, but they didn't know what their new positions or roles would be, or if they would stay together. In the end, there were only a few changes in who reports to whom, but the uncertainty caused anxiety and required the revision of clearance processes, causing delays in the approval of some DE products.

Effect of Navigating Bureaucratic Processes on the DE

Conducting a DE within a bureaucratic organization presents a number of challenges to DE activities from collecting, sharing, and utilizing data to embedding the Developmental Evaluator. The Developmental Evaluator reflected on the complexity of the bureaucracy and how to mitigate its effect on the DE during an interview in May 2021: *“It's so complex because there are multiple systems. In order to make any changes that have any real stick to them, there are multiple levels of this bureaucracy. Because it's a matrixed, sort of organization, on top of what was already a complex bureaucracy, it's just really complicated to make change. It happens slowly. Keeping that in mind and recognizing why things move slowly, that helps. Also having that perspective and knowing that there are other places to go in this large system where you might be able to tweak a lever or gain a new perspective is useful too.”* Additionally, throughout the DE, the Developmental Evaluator kept the DE principles around complexity perspective and systems thinking front of mind to help remind her what she could influence especially within a bureaucracy.

One particular challenge to conducting this DE was the effect of bureaucratic processes on the ability to implement the DE principle of timely feedback. Many bureaucratic processes slowed down the ability to collect, share, and utilize data because the Developmental Evaluator and teams needed to follow USAID procedures and processes. Bureaucratic processes also slowed down the Key Issue Narrative Analysis and the Digital Development Network Analysis. For instance, the Developmental Evaluator wanted to share the Key Issue Narrative data but since the data is derived from internal reporting, it required permission from the Missions to share externally. Therefore, in the case of the Key Issue Narratives related to Digital Payments, the Developmental Evaluator pivoted to share the data internally through a basic map on the USAID internal website. However, although she had access to edit the website, security features prevented the creation of a map. In the end, they decided to seek permission from the Missions to post a small number of cases on a public-facing website. Despite the experience, the Developmental Evaluator emphasized that although bureaucratic processes can slow DE activities down, the information is still appreciated and useful when it is shared because being timely is relative in a bureaucratic context.

She also reflected that timely feedback was not an issue in smaller events such as workshops with individual initiative leads, as she could quickly reach out for information, analyze the data, get feedback, and then share the data with the initiative leads. Throughout the DE, the Developmental Evaluator was creative in finding ways to gather and share feedback in a way that abided by but did not get bogged down by bureaucratic processes.

Recommendation: If timely feedback is critical to the success of the DE or the program, consider structuring the DE with small rather than large initiatives.

Bureaucratic procedures can not only slow down processes but also reduce the amount of data gathered. For instance, the same day the Developmental Evaluator shared the Digital Development Network Analysis survey with the Digital Sector Council, an Agency-wide notice came out reminding everyone of the survey clearance process. However, the Digital Strategy lead had gotten a fast track process approved through the Paperwork Reduction Act the previous year, so requests would have to be turned around in a week rather than 6 to 7 months, but the fast track approval process had not yet been announced across the Agency. Unfortunately, whoever put out the Agency-wide reminder did not appear to be aware that this other process existed. As a result, the Digital Development Network Analysis went on hold as the Digital Strategy lead tried to coordinate with the Management Bureau. It took over 2 months to clear both the content of the survey and the overall content of the notice, which described the purpose of the survey. The survey was then included as a single link in a long daily notice—resulting in very low response rates—only seven additional survey responses.

In the words of the Developmental Evaluator, *“It was a complete bust, a waste of time. We could have been doing it earlier.”* The Developmental Evaluator noted that she could have collected the required data via informational interviews with people working in digital initiatives to inform snowball sampling instead of waiting for the survey to be approved. In the end, the Developmental Evaluator also sent the survey to the Evaluation Interest Group; Collaborating, Learning, and Adapting (CLA) community practice; and two other working groups. That brought the total up to 69 responses, all of which identified other individuals working in digital development. The Developmental Evaluator then sent out individual emails and ended up with 119 responses in total (105 responses after the data was cleaned).

Recommendation: DEs that consider using surveys across the Agency should advocate for a separate notice encouraging staff to complete the survey or have a backup method for data collection.

People within USAID served as enablers in navigating USAID’s bureaucratic processes—see **Box I** for related recommendations

BOX 1: PEOPLE AS ENABLERS IN NAVIGATING USAID'S BUREAUCRATIC PROCESSES

Navigating the bureaucracy has its own set of challenges that can slow timelines and lead to an inability to move forward without the right connections. For example, the Developmental Evaluator shared that it was amazingly complex and opaque to figure out how to provide input on improving the instructions and guidance for Missions completing the Key Issue Narratives. However, in the end, the Developmental Evaluator, along with two other key DE stakeholders (the DE buyer and an initiative lead), figured out who to ask, and as a result, the Developmental Evaluator and others got access to rewrite the instructions. As the Developmental Evaluator reflected on the experience, she shared, *“It takes patience; it takes who you know; it takes banging your head against the wall.”*

Recommendation: Developmental Evaluators can better navigate USAID's bureaucratic processes through well-connected people who have Agency knowledge and clout.

Indeed, one of the key enablers for the Developmental Evaluator to overcome several barriers associated with bureaucratic processes was connections with people. For example, a key recommendation she gave for improving the quality of the Key Issue Narrative data beyond rewriting the instructions was to reach out to Missions about their responses to the Key Issue Narratives so that they know someone is reading and using the data they provide. The Developmental Evaluator shared, *“That is my not-so-hidden agenda that I really am serious about. We need to let people know in Missions that this onerous bureaucratic, seemingly pointless task actually generates extremely valuable data. The only way we have any visibility over much of what goes on in Missions. Ironically, it's just so decentralized. There's no other place ... how do you find out because money goes to Missions, then Missions program most of the money, and they go to implementing partners, and they report, but there's no way of centralizing all of the information.”*

Recommendation: Making person-to-person connections within a large bureaucracy can go a long way, including improving the richness of data that DEs are able to collect.

Another source of pride for the Developmental Evaluator during the DE was contributing to changes in meeting norms. The remote work environment made it easy to stack five or six meetings in a row since accounting for time to physically transition attendees to meetings was not necessary. During the Connect & Reflect sessions, staff shared ideas for ways to reduce the number of meetings. In parallel, parts of the broader Agency put in place a meeting-free week. As a result, there was recognition that they needed to work differently, and the time was ripe for change. As more people put in practice and advocated for conventions to reduce and improve meetings, the overall environment around meeting expectations shifted for the better.

Recommendation: Bureaucratic processes can be improved through collective action of people within the Agency.

Together the above recommendations illustrate ways people can serve as enablers in navigating USAID's bureaucratic processes.

USAID's processes also influence the ability of the Developmental Evaluator to embed within teams. The process of obtaining basic facilities clearance to obtain a USAID email address or to get security clearance takes time. Luckily, the Developmental Evaluator still had her USAID email address from her previous engagement and was able to reach out to DE stakeholders immediately.

Recommendation: When determining the DE start date, account for the time required for the Developmental Evaluator to obtain basic facilities clearance and/or security clearance.

Before any new technology or platform can be used by USAID staff to collect, analyze, or share data, it has to be approved by USAID. During the DE, this approval process slowed down the adaptation to remote work, with Jamboard, a digital whiteboard platform that facilitates collaboration, not being approved until a number of months into working remotely because of the pandemic.

Recommendation: Developmental Evaluators should use platforms and technologies for collecting, analyzing, and sharing data (including facilitating meetings) that are already approved by the Agency, as approval processes for new platforms take time.

This DE was unique as a national election occurred during it, which indirectly influenced the DE. Since USAID is a governmental organization, the election was brought up in every meeting in one way or another, even before the election happened, though participants were careful not to violate the Hatch Act, which prohibits expressions of partisan preferences. In addition, some initiative members were pulled away from their day-to-day responsibilities to develop write-ups for the current Administration. Changes in Administration require even more work. For instance, when Samantha Powers became the new USAID Administrator and given the Biden Administration's interest in digital, the focus on digital was elevated across the Agency. Staff members were tasked to develop proposals for future large-scale digital work, which increased their workload.

Recommendation: Anticipate USAID staff may be distracted during an election year, which can influence their commitment to the DE.

Effect of Social Norms on the DE

The Developmental Evaluator raised a number of social norms within USAID units or teams that influenced the DE. The Developmental Evaluator shared, *"In the USAID context realizing that there are these cultures, I think they actually [are in] any context, there are these cultures or cultural practices, that I would prefer to call it. There are subcultural practices, and that may go against the larger one or sometimes may exacerbate them."*

Part of what made the Digital Strategy a good fit for DE was that the culture within the Lab (before it was dismantled) overlapped with many DE principles and practices, such as adaptive management, rapid feedback, and co-creation. Additionally, the Principles for Digital Development overlapped with the DE principles. As one stakeholder described it, “USAID is an unusually, intellectually and emotionally safe place to work. ...The DE can recognize or point out ‘maybe if you did something this way’ or ‘this is what I heard you saying maybe if you tried x, y, or z’ people are totally safe to accept that. There’s no scorekeeping other than as a collective, we’re doing better. ...No one feels threatened by anybody else. That kind of fearlessness or trust or safety is hugely important for the DE to be successful.”

Recommendation: Ensure a learning-oriented and collaborative culture exists before starting a DE.

Another enabling norm was that the Developmental Evaluator did not have any authority over anyone. Stakeholders reported this as being immensely helpful for her ability to communicate with people. It created a depowered evaluation dynamic since she wasn’t a supervisor or even part of their team, but rather, she was just someone to help get work done.

Table 2 categorizes some of the norms that go against the largely positive culture for DE that exists within USAID. These norms were identified during secondary coding of the monthly interviews and were then triangulated in interviews with key DE stakeholders. **Table 2** categorizes these norms by their effect on the DE from slowing down DE activities, to making it difficult to embed and build relationships, to creating barriers to sharing information. Each of these norms is explored in these three categories followed by recommendations that could help reduce their effect on future DEs facing similar situations.

Table 2: Social Norms Within USAID That Can Negatively Influence DE

Norms That Can Slow DE Activities Down	Norms That Can Make It Difficult for the Developmental Evaluator to Build Relationships and Embed	Norms That Are Barriers to Sharing Information
<ul style="list-style-type: none"> ■ Annual slowdowns ■ Practice of rescheduling meetings ■ Too many meetings ■ Emphasis on consensus and collaboration 	<ul style="list-style-type: none"> ■ Evaluation fear ■ Low trust of USAID outsiders 	<ul style="list-style-type: none"> ■ Information preferences around trusting quantitative data more than qualitative data

Norms that can slow down DE activities include being consensus-based, having annual slowdowns, the practice of rescheduling meetings, and having too many meetings. People

within USAID are generally open to collaborating, and the Agency tends to be a consensus-based organization, which can result in slow decision-making. Sometimes it results in going back and forth so much that decisions are never even made. Despite slowdowns, having a consensus-based foundation is a valuable asset for the DE and in particular for the co-creation principle.

Recommendation: Leverage USAID’s consensus-based culture for co-creation throughout the DE but also consider the timing needed for collaborative activities.

The DE encountered two periods of slowdown across the Agency during the months of August and December. Initially, the Developmental Evaluator tried to schedule the acculturation workshops in August, which was challenging because many people were on vacation. Additionally, during the first year of the DE, the Developmental Evaluator took one week off during the December holiday period, which left her with a week of “*really quiet time for work.*” However, she noted that the DE timing and her productivity were affected more during the second December when some staff took the full month off and many took 2 or more weeks off.

Recommendation: When planning DE activities, keep in mind that August and December are difficult months to engage staff but can be a good time to get ahead in planning and analyses that do not involve staff.

As referenced earlier, the DE attempted to help reduce the meeting culture by limiting the number and duration of meetings to allow staff to have more time to do deep, uninterrupted work. One stakeholder we interviewed shared that he had 27.5 hours of meetings scheduled for the week, which was probably on the high end for USAID staff but not terribly so. Throughout the DE, the Developmental Evaluator needed to delay activities or reschedule meetings when retreats (whether at the Digital Strategy level or because of the reorganization of the Bureau) or mandatory sessions occurred and required all involved staff to participate for large amounts of time. At the same time, staff members grew frustrated when leadership had too many meetings to attend and as a result did not attend meetings they were originally scheduled to participate in, which included Connect & Reflect sessions.

DE activities were also slowed down because of the common practice of rescheduling meetings. One of the key stakeholders interviewed explained that to create time to do deep work, if there is a day where he has one meeting scheduled and the prior 2 days he had a ton of meetings, he will reschedule that one meeting so he can have a day where he can fully focus on whatever he is behind on.

Recommendation: Anticipate delays or reduced ability for USAID staff to engage deeply in DE activities because of USAID staff being pulled into many meetings or needing to reschedule meetings.

Norms that can make it difficult for the Developmental Evaluator to build relationships and embed include evaluation fear and low trust of outsiders. Monitoring, Evaluation, and Learning have been built into much of what USAID does, and as a result, there is a culture of measuring and evaluating all the Agency’s work to ensure it is effective and uses taxpayer dollars responsibly. However, individuals can become fearful of evaluation if they feel like they are being judged. However, the Developmental Evaluator did not encounter much of this culture. Instead of using the title “Developmental Evaluator,” she used the title “Senior Learning Advisor” to preemptively make DE less threatening. As part of this effort, she also emphasized that a large part of DE is around learning and supporting adaptive management. She also leveraged DE champions within USAID, such as the DE buyer, to help key stakeholders overcome fears that the DE could make them look bad.

Recommendation: Consider using a different title than Developmental Evaluator and emphasizing the learning component of DE if evaluation fears are present in your key DE stakeholders. Leverage DE champions within USAID to help USAID staff overcome their fears of DE.

The Developmental Evaluator noted that she observed that USAID staff have a low trust of people outside of USAID. A stakeholder noted that part of this is because many people at USAID are reluctant to engage in anything additional such as the DE because they don’t have time. The Developmental Evaluator shared that it helps to demonstrate knowledge of how USAID works, as *“there’s a certain level of trust that is built when you can use the lingo or you know that certain things are impossible, or you can know who to talk to about things.”* The Developmental Evaluator felt she was able to build trust with most people relatively quickly because she was seen as an insider, or a former insider, because she used to be in the Lab.

Recommendation: When hiring Developmental Evaluators for a USAID DE, look for candidates that are familiar with how USAID operates and can “speak their language,” or be sure to train your Developmental Evaluator on these topics before they begin interacting with USAID stakeholders.

Information preferences can create barriers. The Developmental Evaluator found some USAID staff expressed opinions that quantitative findings are more valuable and rigorous than qualitative findings. However, there are many constructs on which you cannot collect quantitative data.

Recommendation: When collecting data for a DE, Developmental Evaluators should consider using mixed methods to appeal to data preferences within USAID. When sharing qualitative data, Developmental Evaluators should emphasize the rigor of the methods used, trustworthiness of the data, and, when appropriate, why qualitative methods provided more value than quantitative methods in that particular case.

The Developmental Evaluator also found that USAID staff prefer to receive data in small digestible pieces such as one pagers, checklists, and data visualizations. Many USAID staff shared that they do not have time to read reports.

Recommendation: Developmental Evaluators should share data in short and easy-to-digest formats in order to increase the likelihood of USAID staff engaging with and using the data.

LEADERSHIP

Leaders hold much potential to enable DE activities as DE champions, but at the same time, they also have the ability to serve as a barrier to DE and undercut DE activities. In past DEs, leadership has served as a top barrier. The Digital Strategy DE also from time to time encountered barriers to DE activities created by leadership. As one DE stakeholder shared, *“When you are thinking about making broader changes or front office type of changes to implementation, you need leadership buy-in, and I think that could be a challenge sometimes.”*

During the Digital Strategy DE, we found that leadership could influence the DE’s intended focus and timeliness, as well as the Developmental Evaluator’s contextual understanding in a negative way. Indeed, some of the work the Developmental Evaluator intended to do was put on hold because of changes in focus directed by leadership. For example, the Digital Skills initiative’s learning personas were put on hold when the Digital Strategy lead asked the initiative lead to focus on something else first. Nevertheless, by being responsive to shifts in priorities, the Developmental Evaluator was able to provide timely support for work that the Digital Strategy leadership deemed most important. Leadership engagement can also influence the Developmental Evaluator’s depth of contextual understanding. When the implementation lead of the Digital Strategy started to be pulled into higher-level meetings and began to prepare for her next posting, she became less involved in the day-to-day management of the Digital Strategy. This resulted in the Developmental Evaluator being less in tune with some of the Digital Strategy-wide issues. The Developmental Evaluator still had other sources to obtain contextual information from, but they were not comprehensive.

Recommendation: When leadership creates barriers to DE, the Developmental Evaluator should assess the related risks to the DE and implement strategies to mitigate the negative effects.

Leadership can also be an enabler. In particular, individuals within USAID who serve as DE champions are major enablers of DE activities. Within the Digital Strategy DE, the two individuals who originally initiated the DE from USAID’s side held high leadership positions and were DE champions throughout the DE (see **Box 2** for characteristics of Digital Strategy DE champions). The Developmental Evaluator reflected that having a strong partner as the main point person was key to the DE’s success, as without their support, the DE activities likely would not have been as successful, even if there were other supporters of the work. The DE buyers were generous with their time and stayed involved throughout the DE through regular communication. Their involvement ranged from working with the Developmental Evaluator to apply lessons from workshops to the next iteration of workshops, to holding regular

meetings with the Developmental Evaluator. With that being said, the Developmental Evaluator had other DE champions throughout the DE who also advocated for and supported DE activities. In fact, the Developmental Evaluator reflected that DE champions evolved throughout the DE.

Although the DE buyers remained champions throughout the DE, new DE champions also emerged with time. For instance, the Digital Strategy initiative team leads became champions early in the DE, while the Digital Strategy leadership became champions a few months into the DE as they began to see value. Through frequent meetings or communications, individuals typically begin to see the value of DE activities and then start to internalize and adapt some of the DE activities into their own work. For example, the Developmental Evaluator observed that staff members started using more interactive approaches, such as Jamboard, after becoming comfortable with them and seeing their value in Connect & Reflect sessions. Another example is that the Digital Ecosystem Fund initiative started to apply some of the writing activities the Developmental Evaluator used in the Connect & Reflect sessions to enhance their collaboration in other meetings.

Champions were also created indirectly during the DE. For example, the Developmental Evaluator offered to serve as a sounding board for an individual working with Missions to co-create according to the Principles for Digital Development. The individual was quick to accept the offer, as she was already familiar with the DE from attending the Connect & Reflect sessions. The interactions with the Developmental Evaluator led to the individual becoming a major DE champion.

Recommendation: The Developmental Evaluator should continue to develop champions for their cause. To do so, they should consider holding open meetings, seeking opportunities for connection, and maintaining open communication channels. This will help socialize DE and make it more accessible to a broader set of USAID stakeholders to create more DE champions throughout the lifetime of the DE.

BOX 2: DE CHAMPION CHARACTERISTICS

Secondary analysis found the following key characteristics of DE champions:

- **Genuine openness to learning**—DE champions have a curiosity and desire to learn, as well as a willingness to trust the DE process. They are not fearful of the evaluation label. Rather, they want input on whether there is anything they can change that would let them do their work better.
- **Collaborative**—DE champions have a willingness to engage and problem solve. For instance, in this DE, the DE buyers participated in after-action reviews to inform adaptive management of DE activities and reviewed and iterated on network maps, in addition to other activities. Other DE champions arranged regular meetings with the Developmental Evaluator to bring her into their work.
- **Understand and convey USAID dynamics to the Developmental Evaluator**—DE champions have knowledge of USAID stakeholders' information preferences and how to best approach USAID stakeholders and convey this information to the Developmental Evaluator.
- **Understand the technical aspects of DE**—DE champions understand the technical aspects of DE and can thus advocate for the methodology and limit misunderstandings on its purpose. For instance, during this DE, a DE champion alerted the Developmental Evaluator that there were discussions that a DE activity she was leading might be changed in a way that did not align with her vision. Thus, in this case, the DE champion advocated on the Developmental Evaluator's behalf internally to leadership regarding the DE purpose. Champions can also help DE stakeholders understand how to take advantage of the DE and best engage with it to create the most value for their work.
- **Invested in DE success**—DE champions are generous in using their connections within USAID to advocate for DE, as well as to overcome barriers to DE. As expected, the DE buyers were invested in the DE succeeding and thus were proactive in soliciting feedback on the DE from key DE stakeholders and sharing relevant information with the Developmental Evaluator. DE champions also advocate for DE even when they are not involved. For example, the Developmental Evaluator shared that on the CLA Community of Practice listserv, which has 865 people on it, someone asked, "Does anybody have any good examples of adaptive management techniques?" Before the Developmental Evaluator could respond, the prior DEPA-MERL Contracting Officer Representative responded that the individual should look at DE and shared relevant links. USAID staff also trust internal DE champions and thus feel comfortable expressing any concerns related to the DE. As mentioned earlier, DE champions helped people involved in the DE overcome their evaluation fears.

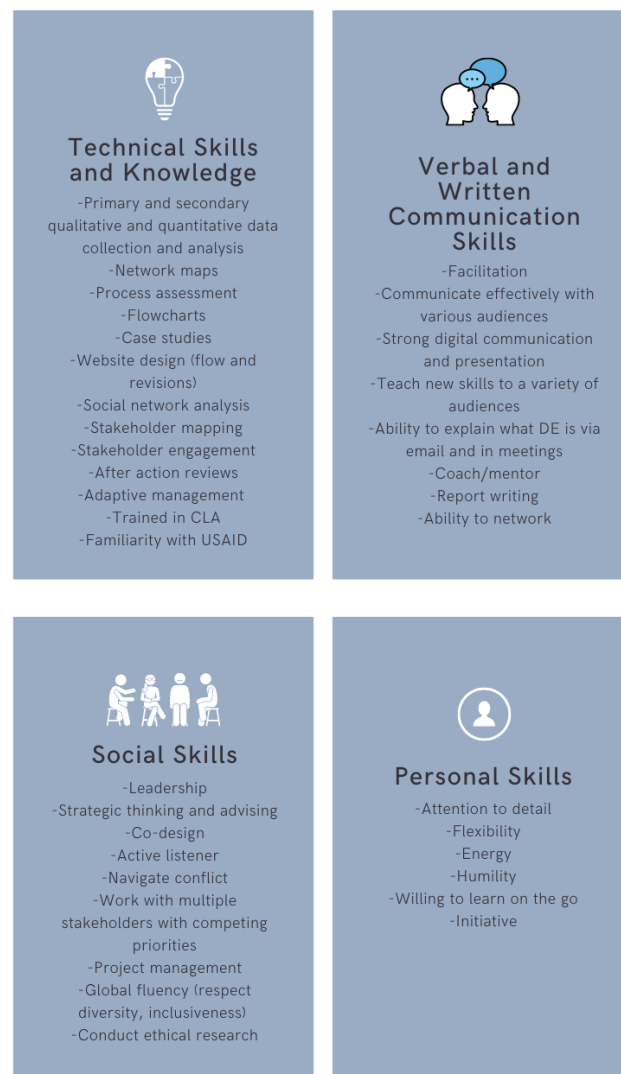
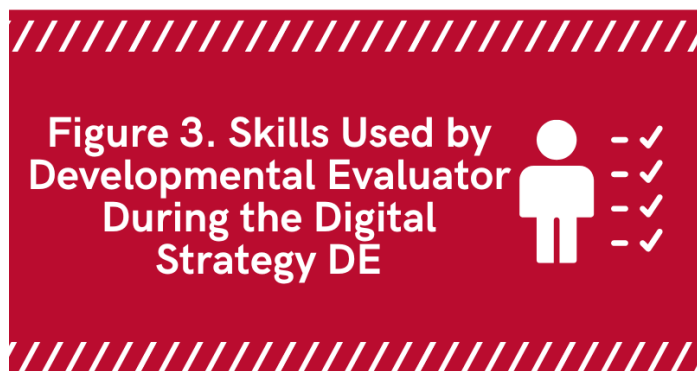
Recommendation: Developmental Evaluators should target leaders and people within the DE who have some or all of the above characteristics to increase the likelihood of leadership serving as enablers rather than barriers to the DE.

SKILLS OF THE DEVELOPMENTAL EVALUATOR

Skills of the Developmental Evaluator have been a top enabler of DE implementation.^{xi,xii} This DE was no different. Two DE stakeholders mentioned the Developmental Evaluator’s skill set, experience, demeanor, and approach as the largest enabler to the DE. A Developmental Evaluator’s skill set can help overcome some of the barriers noted earlier related to USAID dynamics. For instance, it is important for a Developmental Evaluator to have the ability to build strong relationships with USAID staff to successfully facilitate use of DE data and insights. Thus, an understanding of USAID’s culture and an ability to gain staff members’ trust are critical Developmental Evaluator skills.

See **Figure 3** for a list of skills used by the Developmental Evaluator during the Digital Strategy DE. The DE required that the Developmental Evaluator not only have a range of robust technical skills and knowledge but also a great deal of communication, social, and personal skills. Verbal communication included teaching new skills to a variety of audiences, such as how to make meetings or presentations more engaging, as well as coaching and mentoring DE stakeholders. Indeed, together the Developmental Evaluator’s technical CLA skills and verbal facilitation skills during a 10-minute brainstorm session for the Key Issue Narrative Analysis resulted in responses from participants such as *“this is one of the most shockingly productive brainstorming sessions I’ve ever been in.”* And others said the following related to the Connect & Reflect sessions: *“You know, this is the most productive meeting all week, for sure,”* and *“yeah, we’re having all these two-hour long retreat meetings, and we don’t really accomplish anything in those two hours. In 30 minutes, you can kind of crowdsource in the short amount of time, a huge amount of information.”* An important technical skill discussed earlier is familiarity with USAID, as the Developmental Evaluator emphasized, *“There’s a certain level of trust that is built when you can use the right lingo, or you know certain things are impossible, or you can know who to talk to about things.”*

On the social side, the Developmental Evaluator was constantly balancing the priorities of multiple stakeholders since the DE required working with multiple digital initiatives. The DE also required a range of personal skills



including a willingness to learn on the go since the DE ended up being entirely virtual, resulting in the Developmental Evaluator needing to test and apply new digital communication techniques to allow for effective and productive digital interactions. For instance, during the acculturation workshops in September 2020, the Developmental Evaluator taught teams how to use the white space around each Google slide as a virtual whiteboard by zooming in and out. She also taught them how to use virtual Post-It notes so they could brainstorm questions together.

RECOMMENDATION: Hiring a skilled Developmental Evaluator (one who has strong technical, interpersonal, social, and communication skills) will be one of the most important activities to enable success of the DE.

FINDINGS FOR RESEARCH QUESTION: WHAT DO KEY STAKEHOLDERS CONSIDER TO BE THE VALUE (ADDED OR LOST) OF CONDUCTING A DE COMPARED TO A TRADITIONAL EVALUATION APPROACH?

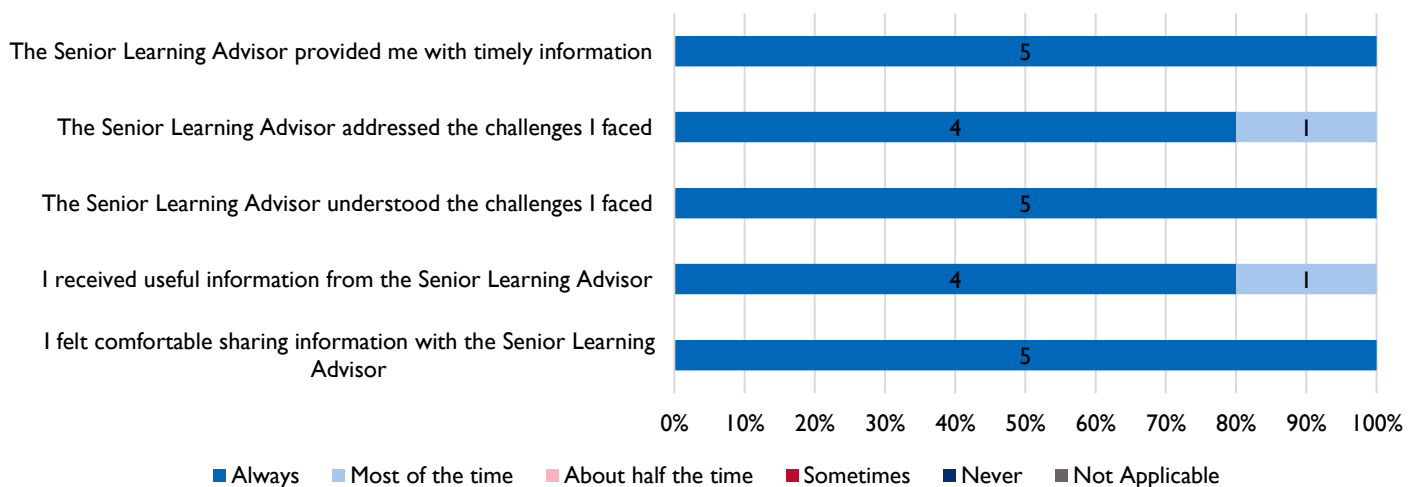
The WDI team distributed the Value of Developmental Evaluation Survey to 26 key stakeholders ahead of the DE Wrap-Up Learning Session to assess the DE approach in the context of the Digital Strategy DE. Five individuals responded fully or partially.

INTERACTION WITH THE DEVELOPMENTAL EVALUATOR

The WDI team assessed the value of survey respondents’ interactions with the Developmental Evaluator through a question with five subitems. Respondents could answer using a five-point scale that ranged from 1 (*never*) to 5 (*always*). Results are shown in **Figure 4**.

Overall, respondents reported positive interactions with the Developmental Evaluator. On all except two of the five subitems, respondents used the highest rating on the scale (i.e., *always*). Notably, none of the respondents used *about half the time*, *sometimes*, or *never* in response to a subitem of this question.

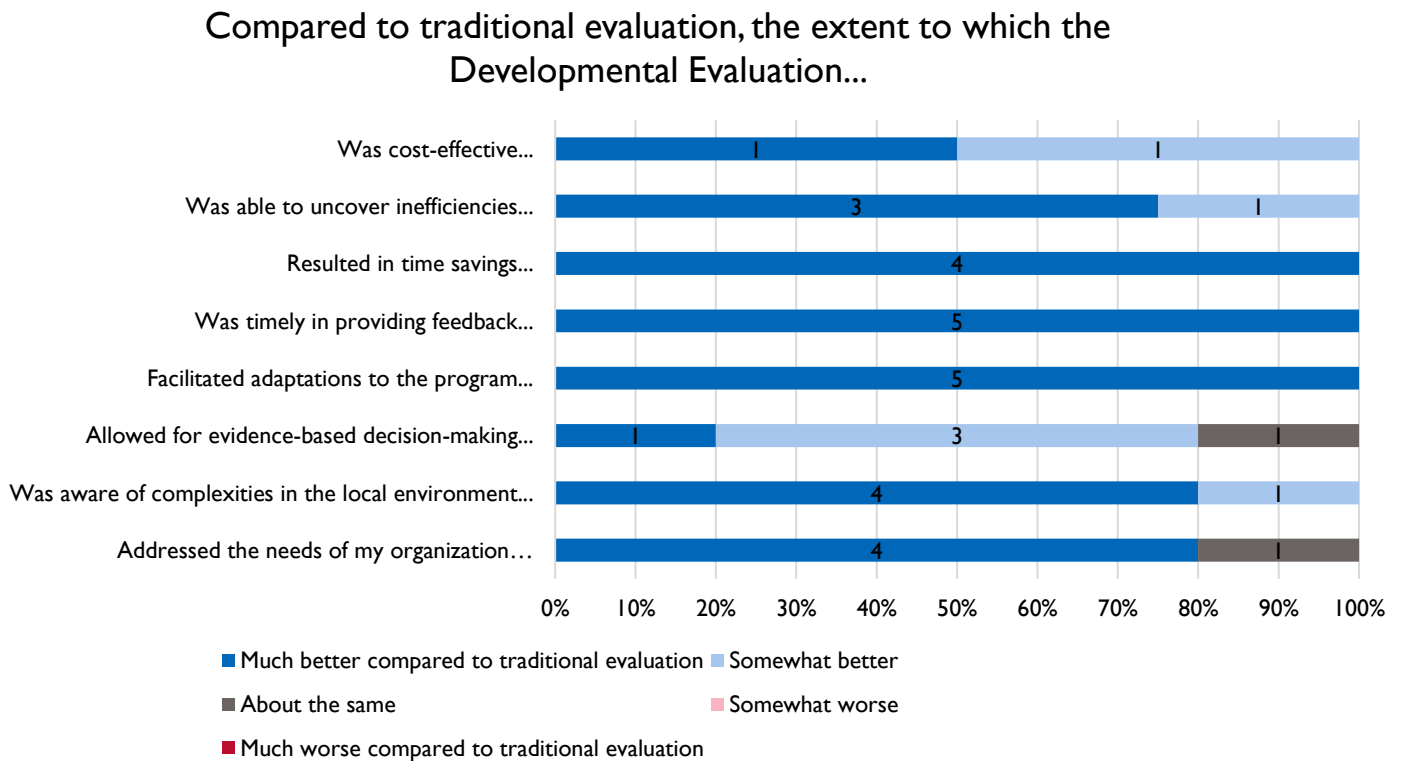
Figure 4: Survey Respondents Reported Positive Interactions With the Developmental Evaluator (n = 5)



DE COMPARED TO TRADITIONAL EVALUATION

The WDI team assessed how the Digital Strategy DE compared to traditional evaluation through a question with eight subitems. To rate the Digital Strategy DE, respondents used a five-point scale that ranged from 1 (*much worse*) to 5 (*much better*). Results are reported in **Figure 5**. Generally, survey respondents reported that the Digital Strategy DE was more valuable than a traditional evaluation. On all but one of the eight subitems, more than 50% of the respondents reported that the Digital Strategy DE was *much better* than a traditional evaluation. Across all subitems, none of the respondents said that the Digital Strategy DE was either *somewhat worse* or *much worse* compared to a traditional evaluation. However, only two respondents answered the question about cost effectiveness. This could suggest that respondents did not feel like they had enough information to answer this question. One respondent who chose not to respond to this particular question stated later in the survey, “*I don't know the cost, but it seems like a really good value to me. I'd be interested in knowing the ROI compared to the cost, but even without that information, I can pretty easily endorse the DE without any hesitation.*” A sizable percentage of respondents (80%; n = 4) responded that the extent to which the DE allowed for evidence-based decision-making was much or somewhat better (compared to a traditional evaluation).

Figure 5: Survey Respondents Perceived the Digital Strategy DE as More Valuable Than Traditional Evaluation (n = 5)



MOST VALUABLE ASPECTS OF THE DE

In response to the question, “In what ways was the DE most valuable?” respondents (n = 2) emphasized ways in which the Digital Strategy DE created value for their particular initiative. As one respondent shared, “Helping identify challenges and issues with the upskilling initiative and helping to come up with effective solutions.” Additionally, another respondent commented that the most valuable aspect of the DE was making connections across the initiatives.

During the final learning session and interviews with key DE stakeholders, each initiative lead shared that their one-to-one meetings with the Developmental Evaluator were one of the most valuable parts of the DE. The meetings provided initiative leads the opportunity to overcome a paralysis of critical thinking that comes from being too busy, being overworked, and being underfunded. The initiative leads found it helpful to be able to think out loud with the Developmental Evaluator, bounce ideas off of her, and hear her perspective, constructive criticism, and guidance.


LEAST VALUABLE ASPECTS OF THE DE

According to the respondents who answered the question (n = 2), the least valuable aspect of the DE approach was knowing how to optimally use some of the cross-cutting DE activities like the Digital Development Network Analysis and the Key Issue Narrative Analysis.

PERSPECTIVES ON USING DE AGAIN


Respondents were asked two separate closed-ended questions about whether they would recommend the DE approach. First, they were asked whether they would like to see DE continued at their own organization. All four of the respondents who answered this question said yes. Three of these respondents had not participated in a DE until the Digital Strategy DE.

The second question asked respondents whether they would recommend the DE approach to other organizations. All four respondents (100%) said yes.



"It feels like having an advocate, who wants you to succeed, but is also good at helping you figure out how to succeed."

"Simply put, it works and it is effective. To me, it comes down to this—why wait for a project to be over and look at data to determine success or failure, when you can fold some of that into the project process itself and help assure that you are going to land directly or closer to your target outcome(s)..."

 *"Yes please! Very very very useful."*

"This experience confirmed previous experiences highlighting their usefulness."

CONCLUSIONS

Stakeholders of the DE reported that the main goals of the DE were met. Those goals included helping those who were implementing the Digital Strategy learn as they went along and helping them collaborate and communicate across what was a very ambitious and complex strategy. The Developmental Evaluator accomplished this by working one-on-one with initiative leads to inform innovations and strategic decision-making, as well as identifying and implementing strategic activities that cut across the initiatives such as the Key Issue Narrative, the Digital Development Network Analysis, and developing meeting norm culture changes. The Digital Strategy DE demonstrates that DEs can design and implement solutions that increase communication and coordination across USAID.

Investigating the top enablers and barriers across the DEPA-MERL DEs, which were also the top enablers and barriers in the Digital Strategy DE, led to the following high-level takeaways:

1. Three main dynamics within USAID influenced the Digital Strategy DE: *bureaucratic processes, lack of clarity of decision-making power, and social norms*. A Developmental Evaluator's skill set can help overcome a number of barriers created by these dynamics within USAID. Additionally, making person-to-person connections within USAID can help overcome barriers to DE created by bureaucratic processes.
2. USAID's learning-oriented and collaborative culture is a strong enabler of DE. At the same time, there are norms (such as annual slowdowns, too many meetings, and limited trust of outsiders, among others) that can slow down DE activities, making it difficult for the Developmental Evaluator to build relationships and become embedded in the program. There are also information preferences such as a preference for quantitative data (compared to qualitative data) that can serve as barriers to data sharing and utilization.
3. DE Champions within USAID have the following characteristics: genuine openness to learning, collaboration, understanding, and willingness to convey USAID dynamics to the Developmental Evaluator, understanding the technical aspects of the DE, and investing in the success of DE within the USAID context.

Based on the analysis of the Value of Developmental Evaluation Survey, which included responses from five stakeholders, the WDI team found the following:

4. Overall, respondents reported positive interactions with the Developmental Evaluator. One hundred percent (n = 5) of respondents reported that they always felt comfortable sharing information with the Developmental Evaluator and that the Developmental Evaluator always understood the challenges they faced and always provided them with timely information.
5. Generally, survey respondents reported that the Digital Strategy DE was more valuable than a traditional evaluation. One hundred percent of respondents reported that DE was much better when compared to traditional evaluation as it relates to time savings (n = 4; one person did not respond to the question), providing timely feedback (n = 5), and facilitating adaptations (n = 5) to the program.

6. One hundred percent (n = 4) of respondents would like to see continued use of DE within USAID, and 100% (n = 4) of respondents would recommend the DE approach to other organizations.

The learnings from the Digital Strategy DE support the continued use of DE within the USAID context and provide insights for those designing DEs within USAID to consider.

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