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## Message from the President

Valerie Gordon

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**2019** brings with it many challenges and opportunities for the CEI. In November we held our first ever Board elections since the organisation started in 2014, and we closed our prolonged start-up phase. We consider ourselves fortunate that while facing the many challenges involved in establishing and managing a truly regional legal entity in the Caribbean, we also managed to establish the organisation's presence within the international evaluation community. This is due in no small part to the vision and stellar leadership that the CEI has benefited from since its inception. In this edition, we pay tribute to our beginnings and to how far we have come in the 5 years since we started. We heartily welcome the new Board of Directors and Executive members, introduced in these pages, who will work together to move the organisation further along the path we have carved for ourselves.

As we move into the 2019-2021 period, there is a challenge to maintain and strengthen the relationships established, while giving more support to the development of evaluation skills in and among existing and aspiring professionals within our membership, as well as advocating more effectively for evaluation in the region among all of our institutions. The new team, is well qualified, energised and ready to serve. We plan to be deliberate in our approach while also being agile and responsive to emerging needs and demands. In this edition, our brand new series of webinars are introduced by Director of Training and Professional Development, Alan Mackie. The first webinar will be held in early May. Our new editor, Director of Research and Publications, Ivan Somlai, to whom we owe a debt of gratitude for this latest publication, is ready to share a treasure trove of information with our members in keeping with his responsibilities for Evaluation Practice.

**Brief Board  
Member Bios**

**Upcoming  
Training  
Webinars**

There is much more to come, but we also pause to pay tribute to pioneers who are no longer with us. The evaluation community lost a giant late last year with the passing of Ricardo Wilson- Grau, one of the founders of Outcome Harvesting (OH). Earlier this year, in a fitting tribute to Ricardo, our colleague Ann-Murray Brown wrote an article on OH as part of her blog series, which we have reproduced here with permission.

We invite our members, as well as current and potential partners within the region and beyond to remain engaged and alert to this next stage of the organisation's evolution, and join us on the journey!

## Notes from the Editor

Ivan Somlai



### **Greetings fellow CEI MonEv practitioners!**

I very much appreciate having been elected to the Board of CEI as Director of Research and Publications and do sincerely look forward to collaborating with you. Any feedback on this publication and its contents is welcome! Being unfamiliar with this publication format, I must express sincere thanks to Pamela Gregory for her kind and patient assistance!

This issue

### ***Aide Memoire* Compilation**

In my current capacity with CEI, one of my “inaugural initiatives”, aside from compiling a periodic newsletter, is to develop a relevant *aide memoire* to assist practitioners in improved understanding of peculiarities in Caribbean culture. Such a document should serve to enhance the relevance and effectiveness of MonEv activities. In this respect, any personal insights readers may have –perhaps examples from previous work wherein you noticed difficulties arising from insufficient local cultural understanding, especially by outside monitors or evaluators – would be welcome. To complement your anticipated input, I do already have about 200 documents from a variety of sources to scour. Thanks in advance!

### **Resources with the Director of Research and Publications**

In my private computer library, there is copious material (articles, reviews, documents, reports, studies, white papers *etc.*) which I would gladly share with our membership.

Should from time to time readers request material from any aspect of monitoring and evaluation, I would endeavour to find related pieces from my own and sundry other sources. If there be no requests, I would

simply select material from my “doc bank”. Personal requests for resources in-between issues of *Eval Chat* would be availed to Premium Members as my time permits.

Appearing in this first new issue of our 2019 Newsletter are a summary by our President, Valerie Gordon, of our organization’s progress from conceptualization to incorporation; and an article from our Director of Training & Professional Development, Alan Mackie, entitled “*The Value of Evaluation*”. Brief, introductory bios of our Board complete the contents of this Issue.

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For more personal details: <http://ethnobureaucratica.weebly.com>

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## The Value of Evaluation

Alan Mackie



It is a great honour to be a member of the board of CEI and to take on the mantle of Director of Training & Professional Development. I am currently working with a group of fellow directors to develop a program of training webinars that will be designed to meet the needs of our members. I hope that you will take the time to participate in the webinars, the first of which will be on May 8 at 2 pm EST.

I have been undertaking evaluation in the realm of social justice for 25 years now. If my experience has taught me one thing, it is the importance of research and evaluation to throw light on social problems and to make visible the needs of our fellow citizens. Here I am thinking of those whose problems just don’t make the 24/7 news cycle: the homeless woman sleeping in a shop doorway, the ex-offender walking through the prison gate with nowhere to go, the young man who has dropped out of school with no grades. Often we simply ignore those populations, or - to borrow from Harry Potter – we throw the “cloak of invisibility” around them. To be out of sight is often to be out of mind.

The “invisibility” of those with developmental disabilities was thrown into sharp relief during a visit I made to the U.S. Virgin Islands this past summer. I was invited by the VI Developmental Disabilities Council to present on “Data Driven Policy Development”. My audience was policy makers, including those standing for elected office. If I had any doubts about the relevance of my presentation, the audience quickly rose to the occasion. “How could the needs of those with disabilities be met in the absence of data?”, they demanded. Without data, this population was “invisible”, their needs unknown to those in charge of policy. Without data, those who advocated for better services were hampered in their arguments. Without data, practitioners lacked the evidence to seek funding for new services.

The US Virgin Islands are still recovering from the two hurricanes that devastated the territory in 2017. As they rebuild the fabric of their communities, it was clear to me that data were not a luxury or a “nice-to-have”. Rather, my audience recognized the value of data in throwing light on a population that had often been marginalized prior to the hurricanes, and whose needs had since become more acute. While there is much more work to be done in defining data and setting up systems to collect and analyze data, I suggest

that their demand for data was a good one and a great call to action.

During the term of my office as a director I look forward to working and learning with you all and developing evaluation skills that will help your programs illuminate social problems and demonstrate their worth. Or, to borrow again from Harry Potter, "*Lumus Maxima!*"

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## **"Five Years On..... A Reflection on the CEI"**

**Valerie Gordon**

Just over 5 years ago, a few brave souls took on the task of establishing the first ever Caribbean Voluntary Organisation of Professional Evaluators (VOPE).

The effort was spurred by reflections on the high hopes and expectations coming out of the IDEAS conference of 2012, held in Barbados, which discussed the establishment of a regional association of evaluators. The attendance of several regional evaluators was supported by the Caribbean Development Bank, and also in attendance was Jim Rugh of the International Organization for Cooperation in Evaluation (IOCE), a major proponent of the Caribbean joining the global evaluation community. Although a nascent group of International Program for Development Evaluation Training (IPDET) graduates existed in a grouping, the next step toward institutionalising an entity representing the region had not yet been taken.

In early 2014, CEI founder and fire starter Megan Scott thought that the absence of the Caribbean from the growing and increasingly vibrant community of professional evaluators was not to be tolerated any longer. With suggestions from Jim Rugh, she called a few persons together to gain consensus on the path ahead. One thing led to another, and soon there was a not-for-profit organisation registered in Jamaica (May 21, 2014) with a Board of Directors and working Executive Committee<sup>[1]</sup>, a draft Constitution, and membership in the IOCE.

In a relatively short time, the organisation had a membership of 50 persons, and was being involved in various aspects of preparation for Eval Year 2015. Although not able to host our own Caribbean Eval Year event, several members of the CEI were involved with the events organised by the American Evaluation Association, IDEAS, and others. As the membership, particularly in Jamaica, grew, the Jamaica chapter was designated a National VOPE.

In mid-2015, Ms. Scott stepped away and Dr. Baptiste took up the reins of President for the organisation. Later in the year, a 3-year Strategic Plan (2015 - 2018) was developed and the draft constitution further refined by members of the very committed Board/Executive Committee.

In April, 2016, CEI established itself on the regional map following an invitation by the Caribbean Network for Urban and Land Management (CNULM), Faculty of Engineering, University of the West Indies (UWI), St. Augustine, Trinidad and Tobago, to co-host the Caribbean Urban Forum in Suriname. The event brought together a range of urban and land managers, policy makers, academics and allied professionals

within the Caribbean. The CEI was ably represented by Dr. Baptiste (Trinidad & Tobago), Paul Williams (Guyana) and Claudia Nicholson (Canada/Grenada).

In 2016, supported by an able Communication Committee, we also launched our newsletter, “Eval Chat”. We have published several quarterly editions, a number of which have been translated into Spanish, an effort we hope to reinforce in the future.

In 2017, a group of seven CEI members participated in the “Made in Africa: An Opportunity for South - South Cooperation”, a dialogue held March 27-28 in Kampala, Uganda, with sponsorship from the Bill and Melinda Gates Foundation. The milestone event, organised by the African Evaluation Association (AfrEA), provided a platform for sharing with other VOPEs from the south[2], exchanges around culturally embedded evaluation theory and practice. The Dialogue, shaped by the “Made in Africa” concept, sought to identify and develop a uniquely African approach to evaluation, emphasising that context, culture, history and beliefs shape the nature of evaluations, specifically in the diverse, often complex African reality. The S2S Dialogue was expanded to reflect on the uniqueness of south focussed evaluations, with the most recent of the convenings held on the occasion of the Joint RELAC/REDCLAME/ IDEAS Conference[3] held in December 2017 in Guanajuato, Mexico.

At the Mexico event, the CEI signed an MOU with IDEAS, the culmination of discussions held between the organisations since initial meetings in Kampala on the occasion of the inaugural S2S Dialogue and the 8<sup>th</sup> Annual Conference of AfrEA. The MOU outlines the organisations’ intentions to collaborate on issues of mutual interest. CEI’s membership in IDEAS also means that paid up CEI members are afforded IDEAS’ member rates at IDEAS Conferences and events.

In November 2018, the CEI was particularly pleased to convene our first elections. The elections were held online, and the very professional 3 person Election Committee came in for high praise from all. The new Board, and the three Country Leads, (Jamaica – elected; Barbados – Interim, and Trinidad and Tobago - Interim), collectively forming the Executive Committee, are introduced in this edition. They took office in January 2019, and look forward to consolidating the CEI brand in regional and international arenas, while focusing more keenly on professional development within our own ranks.

With a current membership of over 120, expectations for the organisation remain high. The new Board/Executive Committee has therefore established the following as priorities for the next quarter:

1. Undertaking a comprehensive capacity development programme for members;
2. Convening of committees to support the strategic priorities of the organisation;
3. Developing a Strategic Plan (2019-2021);
4. Strengthening the interim national VOPEs; and
5. Revision of the organisation’s founding documents (Constitution/Bylaws)

In terms of capacity development, we plan to have a vibrant programme of training and professional development to grow the pool of monitoring and evaluation talents in the Caribbean and among the diaspora. The first in a series of webinars starts in May. A full slate of the upcoming topics is available in this edition.

We urge all who are interested in making a mark on the development landscape of the region to join us in these activities and contribute toward fulfilling our mission:

***“To increase individual and regional evaluation capacity, advocating for the use of appropriate evaluation practices and methods, and the use of regional evaluators”.***

[1] Meegan Scott, (President), Paul Williams (Secretary), Chez Thomas (Treasurer), Lennise Baptiste, PhD, Curline Beckford, Valerie Gordon, Claudia Nicholson and Wycliffe Abrahms.

[2] African Evaluation Association (AfrEA); Caribbean Evaluators International (CEI); Asia Pacific Evaluation Association (APEA); Community of Evaluators South Asia (COE-SA); Pacific Islands Network of Evaluators (PINE); and the Latin America Network of Evaluation, Systematisation and Monitoring (RELAC).

[3] Joint Conference of RELEC-REDLACME-IDEAS, "Evaluation of the Sustainable Development Goals", Guanajuato, Mexico, 4- 8 December 2017

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## **Outcomes Harvesting: A Different type of Evaluation Method**

**Ann-Murray Brown**



### ***What is Outcomes Harvesting?***

Outcome Harvesting collects ("harvests") evidence of what has changed ("outcomes") and then, working backwards, determines whether and how an intervention has contributed to these changes. The approach is inspired by Outcome Mapping and informed by Utilization-Focused Evaluation. It was developed by Ricardo Wilson-Grau and colleagues.\*

### ***Why is OH considered different from most other evaluation methods?***

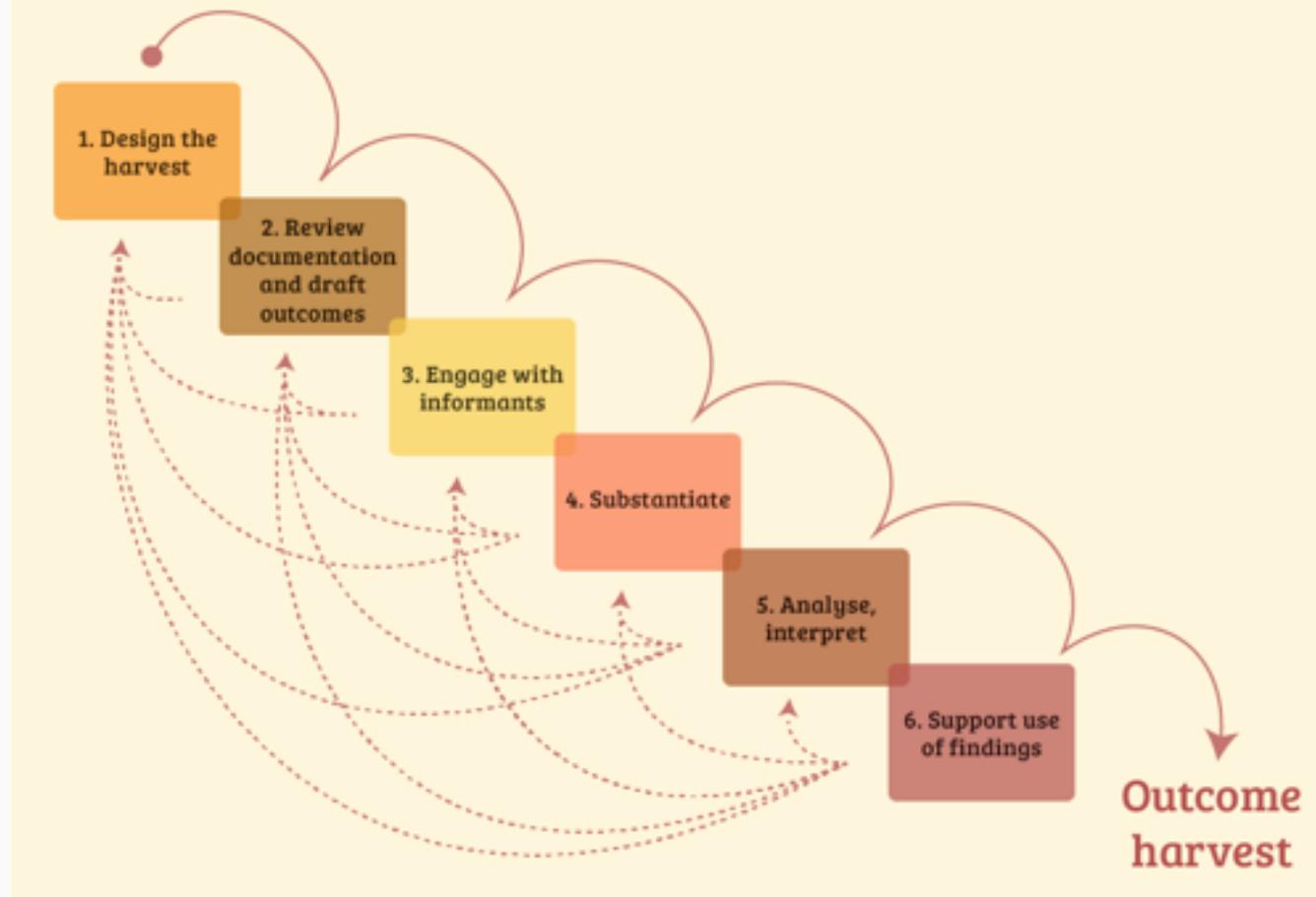
Unlike some evaluation approaches, Outcome Harvesting does not measure progress towards predetermined objectives or outcomes, but rather, collects evidence of what has changed and, then, working backwards, determines whether and how an intervention contributed to these changes. The outcome(s) can be positive or negative, intended or unintended, direct or indirect, but the connection between the intervention and the outcomes should be plausible.

### ***When is OH best used?***

- When the focus is primarily on outcomes rather than activities.
- For evaluations that are on-going developmental, mid-term formative, and end-of-term summative evaluations.
- When a highly participatory monitoring and evaluation process can be facilitated.
- For complex programmes where relations of cause and effect are not fully known or understood. For this reason OH is sometimes dubbed a 'complexity-aware' method.

### ***How is OH done?***

# Steps in outcome harvesting



[https://www.betterevaluation.org/en/plan/approach/outcome\\_harvesting](https://www.betterevaluation.org/en/plan/approach/outcome_harvesting)

## **What are the strengths of OH?**

- Can capture unintended and unexpected outcomes of interventions.
- Does not rely on pre-determined outcomes and generates verifiable outcomes during the evaluation process.
- Uses a common-sense, accessible approach that engages informants quite easily.
- Employs various data collection methods such as interviews and surveys (face-to-face, by telephone, by e-mail), workshops and document review.
- Provided concrete evidence to answer evaluation questions.

## **What are the limitations/challenges of OH?**

- Skill and time, as well as timeliness, are required to identify and formulate high-quality outcome descriptions.
- Only outcomes that informants are aware of are captured.
- The participation of those who influenced the outcomes is crucial.
- It can be challenging for some participants to engage in a method that requires working backwards (that is, starting with the observed changes).

(\*Barbara Klugman, Claudia Fontes, David Wilson-Sánchez, Fe Briones Garcia, Gabriela Sánchez, Goele Scheers, Heather Britt, Jennifer Vincent, Julie Lafreniere, Juliette Majot, Marcie Mersky, Martha Nuñez, Mary Jane Real, Natalia Ortiz, and Wolfgang Richert)

*.Hopefully this brief article has given you an introduction to OH. There are many resources online such as at [www.betterevaluation.org](http://www.betterevaluation.org) if you wish to learn more about the method.*

*This article is dedicated to the memory of Ricardo Wilson-Grau, one of the developers of the OH method, who recently passed away. He was a dear colleague and friend. 'Remember Ann, be bold!' he advised. Those words, coming from someone whom I greatly admired and respected, set me on a path to be fearless in taking my M&E career and life to the next level. Rest in peace my friend, your legacy lives on.*

<https://www.annmurraybrown.com/single-post/2019/01/21/Outcomes-Harvesting-A-Different-type-of-Evaluation-Method>

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## Brief Board Member Bios



**President, Valerie Gordon:** is a Monitoring and Evaluation specialist with 12 years in the field, and an additional 25 years experience in international development and environmental management. She has worked with UNEP, UNDP, UNESCO, CIDA, the Caribbean Development Bank, USAID and extensively with the EU External ROM Monitoring system under which she has monitored projects in Asia, Africa the Pacific and the Caribbean in the areas of climate change and natural resources management, agriculture and rural development, gender and civil society. She has undertaken evaluations for UNDP, UNESCO and the CDB. She is a founding member of the CEI and previously served as VP, Research and Publications.

**Vice President and Director, Partnerships and Strategic Planning, Susan Branker Greene:** (*MSc; BSc*), is a seasoned international development practitioner and evaluator with over 20 years of senior experience working on multi-disciplinary programs and consulting assignments for a range of regional and international development organizations in the English speaking Caribbean. She is the Principal Consultant and Managing Director of Targeted Development Consulting Inc. ([www.tdcworks.com](http://www.tdcworks.com)), a boutique consulting firm established in 2012 and specialising in Monitoring & Evaluation. <https://www.linkedin.com/in/susanbrankergreene/>



**Immediate Past President, Lennise Baptiste:** (*PhD*), has worked in the evaluation field since 2005. Her professional experiences include the evaluation of projects and programmes in the US and across the English-speaking Caribbean for different donor agencies. She is Immediate Past Chair of the CEI Board, and continues to work on behalf of the organisation on the South to South Evaluation Initiative which links the CEI to the to other VOPEs.

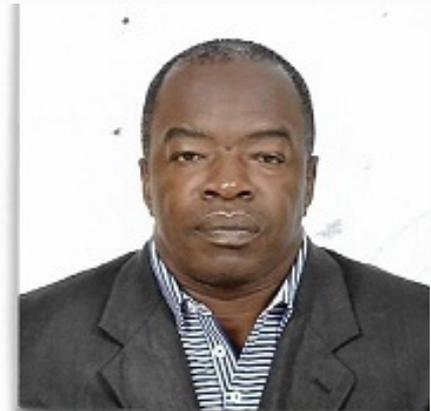
**Secretary, Curline Beckford:** (*BSc; MSc*), is an international development consultant with over ten years substantial experience in developing monitoring and evaluation frameworks at sectoral and national levels. Working primarily in the Caribbean Region, she enjoys conducting participatory programme and project evaluations in diverse sectors including education, energy, environment, water and sanitation, health and social protection. She is an avid gardener and is likely to beat you in a





**Treasurer and Director, Fundraising, Una McPherson:** (*MBA; BSc; Dip. – Tech. Ed.*) is a Monitoring and Evaluation Consultant based in Jamaica. She served as the first Executive Director of the Caribbean Evaluation International (CEI) from 2014 up to end of 2018, during which time she was instrumental in regularizing the organisation’s status with the Companies of Jamaica , the Jamaica Inland Revenue Office and in opening the CEI’s bank accounts. Previously, Una had been Finance and Administrative Specialist with the United Nations Environment Programme (UNEP).

**Director, Marketing and Communication, Jean-Claude Louis:** (*BA [Hon]; Dip. Journalism & Communication; Postgrad. Dip. Fundraising & Resource Development*), has extensive experience in strategic planning, monitoring and evaluation in international cooperation organizations and NGOs as a former executive of Plan International, World Vision International and Consultant for other organizations. His sectors of experience related to the empowerment of different vulnerable groups in the field of sexual reproduction. He is currently the coordinator of Panos Caribbean / Haiti Institute.



**Director, Membership and Recruitment, Melisa March:** (*BA; MPP*). Melisa is a trained policy analyst with extensive experience as a consultant in evaluation and strategic planning to climate change interventions at the community and national levels with the Government of Jamaica and with not-for-profit organizations in Jamaica and the United States of America. Melisa is currently an independent evaluation consultant, while also an Adjunct Lecturer at the University of the West Indies, Mona. Her prior work includes developing and implementing Monitoring & Evaluation systems in the areas of climate change and social protection.

**Director, Training and Professional Development, Alan Mackie:** (*MSc*), is Director of Get the Data, a company that specializes in providing social impact analytics to its clients in the UK, US and the US Virgin Islands. He commenced his evaluation career in 1994 with the British Government's Home Office and has since specialized in evaluation of criminal justice, offender management and alternative education provision. In 2012, he founded GtD with colleagues in London and established the US business when he relocated to Georgia. [alan.mackie@gtd-us.com](mailto:alan.mackie@gtd-us.com) & [www.gtd-us.com](http://www.gtd-us.com)



**Director, Research and Publications, Ivan G. Somlai:** (*MA; CIM*), has, from his base in Canada, monitored and/or evaluated projects globally, in the sectors of extractives, health, education (including TVET), natural resource management, gender, tourism, disaster response and social services. Specific to the Caribbean, his work had involved him with Nicaragua, Honduras, Belize, Jamaica, Panama, Dominica and Guyana.



Having worked with all levels of government and 18 years full time with universities, he continues as a private consultant with, and for, governments, universities, NGOs and firms.  
<https://www.linkedin.com/in/iván-g-somlai-b6b86245/>

**Director at Large, Melanie Inniss:** is a multi-faceted Monitoring and Evaluation consultant conducting evaluations of both project implementation status and organizational capacity. Assessments are carried out to determine compliance to a variety of standards including project cycle methodology (PCM), ISO standards and or corporate standards. She has vast international and multisectoral experience conducting audits and evaluations throughout Europe, Africa, Asia, Pacific, Caribbean focusing on the private sector and small business development.



**Country Lead, Jamaica, Dianna Davis-Smith:** (*MBA; PhD*), is President of the Catholic College of Mandeville, Manchester, Jamaica. For over 23 years, Dianna has a proven record of leadership, training and coaching, having worked in the private sector through her company, EDGE (Educating Developing & Growing Entrepreneurs). She has also been an avid volunteer and has served the terms permissible for board members under the constitution of the Council of Voluntary Social Services (CVSS), Jamaica.

**Country Lead, Trinidad & Tobago, Dennisha Maxime:** (*BSc; MSc; Cert. - IPDET*), is a Senior Monitoring and Evaluation Specialist at the Ministry of Planning and Development, Trinidad and Tobago. She serves with the overarching National Transformation Unit, for Monitoring and Evaluation in Trinidad and Tobago with the mandate to lead, guide and coordinate Monitoring and Evaluation activities in the public sector. She has been in the field for the past 12 years developing performance frameworks, conducting evaluations and assessments, producing national performance reports, spearheading capacity building exercises, developing monitoring and evaluation plans and policies.



**Country Lead, Barbados, Marcia Brandon:** (*PhD*), is a social entrepreneur with expertise in entrepreneurship and people development strategies, specializing in youth and female entrepreneurship development, designing, monitoring and evaluation of programmes and projects, leadership strategies, school to work transition programmes, NGO sustainability, resilience techniques as well as business and social development mentorship and coaching. She is the founder and Managing Director of the Caribbean Centre of Excellence for Sustainable Livelihoods (COESL) and through this organization, she works regionally to build entrepreneurship eco-systems in the Caribbean. Over the past twenty

years she has assisted 4000 Caribbean and global young males, females and adults to start businesses.

more details on our website; see 'About CEI' + 'Our Team'

<https://caribbeanevaluatorsinternational.org/>

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## Upcoming Training Webinars

### Our long awaited webinars will start in May!

Each month we will deliver a 40-minute webinar accessible by seasoned evaluators focussing on various aspects of the discipline. We welcome all interested to these events which will initially be fully open. The webinar will be transmitted via Zoom, so make sure you have that application on your computers. We will share the details of time and login via email, so look out for that.

#### May 8, 2019, 2:p.m. EST

**Evaluation 101: key evaluation methods explained.** An introduction to evaluation methods and approaches. Ideal for those who need to commission evaluations or those who are new to the monitoring and evaluation. *Alan Mackie, CEI Director Training and Professional Development*

#### June 2019

**Responding to RFPs:** in this webinar, advice will be provided to independent evaluators on how to respond to Requests For Proposal and the do's and don't of preparing a successful proposal. *TBD*

#### July 2019

**What are the hallmarks of a good evaluation?** This introductory webinar will identify the hallmarks of a good evaluation as being “technically competent”, “relevant to the intervention” and “designed to promote change”. *Alan Mackie, CEI Director Training and Professional Development.*

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## Upcoming Events

### June 9-12, 2019

**Summer Evaluation Institute, Atlanta, Georgia - "Finding your path in Evaluation".**

<https://www.eval.org/p/cm/ld/fid=661>

Who should attend: Evaluators, applied researchers, grantmakers, foundation program officers, nonprofit administrators, social science students, and you! Sessions are filled on a first-come basis.

**30 September- 4 October 2019**

**IDEAS Global Assembly**  
**Evaluation for Transformative Change - Bringing Experiences of the Global South to  
the Global North**

Third International Conference on Evaluating Environment and Development  
Prague, Czech Republic  
<https://2019.global-assembly.org/>

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