To: AidData Staff
From: Jarrett Burns, Xiao Liu, and Sean Kelleher - MPP PRS Team
Date: December 12, 2013
Re: Final Memo on Assessing AidData's Policy Impact

Initial Scope of Work

The purpose of the project is to assess AidData's policy impact over time. At the onset of the semester, the team was tasked with creating an efficient and navigable system that collects data on and tracks indicators relating to the penetration of AidData's work into the policy community. AidData outlined several questions that the team should address during the project. The first question resulted in the team conducting a comprehensive literature review of how other research institutes assess their policy impact, and how those methods could be applied to AidData. Then, the team located target audiences for AidData, and discussed how AidData might expand its influence in the policy community. After that, the team defined AidData's impact among different targeted audiences, constructed indicators to measure AidData's policy impact, and specified the data to collect. Finally, the team began the process of collecting baseline data for several of the key indicators that had been identified, in order to use the data to evaluate policy impact over time.

Methodology - Structure

A literature review of current AidData and external practices in policy impact assessment informed the organization of the framework, subject to revision and evolution with AidData staff. The analytical framework created to organize the assessment of AidData's policy impact exists as three hierarchies; within each there exists an Outcome, Intermediate Results, and Indicators. A single outcome, representative of an abstract high-level goal, guides each category of assessment. Intermediate Results (IRs) represent more concrete goals that serve to group. Indicators are the metrics of impact that are measured, and for which the tools have been designed.

Methodology - Tools

Indicator Table:

The Indicator Table was created as a tool meant to organize and communicate various levels of outcomes, intermediate results, and indicators for which AidData felt it was meaningful to collect data in order to assess the organization's overall policy impact. The three overarching outcomes that were identified as crucial for achieving this purpose are as follows:

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1. AidData is a thought leader for key audiences within our areas of expertise.
2. AidData creates data and technology solutions that are used by those making, influencing, and implementing policy.
3. AidData informs and influences decisions by policy makers and development institutions.

For a more granular view of the Indicator Table, please refer to the included "Indicator Table" document.

Data Collection Plan:

The Data Collection Plan complements the Indicator Table, the Master Workbook, and each of the other individual tools and processes that have been established to collect data for the purpose of assessing AidData's policy impact. This document restates each outcome, intermediate result, and indicator. It also details step-for-step processes for collecting data on each indicator, transporting the collected data to the Master Workbook, and the AidData staff member responsible for each process. Data is collected through a variety of processes and tools which are described in more detail in the following sections of this document. For a complete view of the Data Collection Plan, please refer to the included "Data Collection Plan" document.

Database Publication/Citation Searches:

As an affiliate of the College of William and Mary, AidData has access to an array of reference databases with which they can track the use of AidData materials, or those using AidData materials. AidData already utilizes Google Scholar to perform a similar function, and as such Google Scholar has been included as a database. Citation searches constitute a large portion of the tools used to collect data on references to AidData in various contexts. The databases have been chosen for the genre of publication they search (e.g. news publications, scholarly journals, etc.), and their ability to be exported with ease into the reference collection suite RefWorks. RefWorks is used to automate the process by organizing searched references into a format that is easily imported into the Master Workbook. The database searches are used to find flat counts of references to AidData's materials, products, or name in any context, with an additional focus on its use in justification contexts in policy-guiding documents.

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Social Media, Website, and Portal Analytical Data:

Through methods currently being practiced by AidData's Communications Team, we are able to collect meaningful quantitative data from AidData's website, newsletter, database portal, and AidData's social media presence. Examples of the variables for which data has been collected include the number of visitors to the AidData website (disaggregated by new vs. return visitors); the number of readers, opens, and clicks of AidData's newsletter; and the number of social media connections that AidData accounts have on various social media platforms. Additionally, we have recommended and begun tracking AidData's "Klout Score." Klout is a social media aggregator tool that is widely accepted and utilized in the professional world. Klout takes various metrics from an individual or group's social media accounts (Facebook, Twitter, Google+, LinkedIn) to calculate a "Klout Score" on a scale from 1-100 that indicates the magnitude of one's total social media presence.

Event Forms:

The professional event forms are designed to track AidData's professional interactions with the research community, policy makers, and the media. Currently, there are three forms capturing AidData's professional interactions: "Consultation Activities", "Organized Professional Events", and "Media Interactions." These forms collect comprehensive information on each individual activity. The team suggests that AidData distribute forms during monthly meetings so that staff members can report relatively soon after the event in question. Form responses are automatically exported to a Google spreadsheet; staff members can then export the data to the Master Workbook.

Master Workbook:

The Excel Master Workbook is intended to be used in conjunction with the Data Collection Plan. It is the ultimate location for housing all collected data. The Master Workbook's "User Guide" worksheet is meant to direct users to the appropriate worksheet to locate indicator-specific data, and informs users what variables are located on each worksheet. Worksheets are separated based on the content of the data each stores (e.g., publication/citation, social media/website/portal, or professional activities). Each worksheet also contains coding tables which helps users understand coded data for relevant variables. Information on how to import data into the Master Workbook is included in the Data Collection Plan, organized by indicator.

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Observations and Implementation:

Outside of concrete deliverables (e.g., the Data Collection Plan, the Master Workbook, etc.), a meaningful portion of the value the team added to AidData has been in the encouragement of further internal dialogue within the organization. Much of what exists in the deliverables addresses or stems from the answers to questions that have been present within the organization for some time. Given this observation, the team recommends that AidData: A) continue engaging in internal dialogue to address matters of communal concern, an option made easier by the shared resource that is the Master Workbook, and B) continue to seek external consultation in order to support internal dialogue by motivating stakeholders within AidData to collaborate on action items.

Through discussions with AidData staff during the duration of the project, different periods of data collection have been suggested, which may be useful when considering the Plan's implementation. Data gleaned from database citation searches appears to benefit most from an annual collection period, given the pace at which publications are produced and the relative automation of the process. Social media and website analytic data is best collected quarterly, as it is at present. Data collected through the Google Forms systems ought to be collected either monthly or immediately after the relevant event, depending upon the readiness of respondents to complete the forms.

Outstanding Items:

Formalizing and Institutionalizing the Data Collection Process:

Given that comparative data becomes more valuable with the passing of each additional data collection period, it is imperative that AidData take advantage of the upcoming performance evaluation season to formally assign data collection tasks to individuals within the organization. The sooner that the tools are finalized and the processes laid out in the Data Collection Plan are formalized within AidData, the sooner the organization can begin to collect data that, over the course of time, will provide a meaningful insight into AidData's relative policy impact.

Survey Creation:

Several of the indicators that were identified in the Indicator Table rely on the creation and dissemination of pre and post-engagement surveys. As the project progressed, this aspect

fell outside the scope of what the team was able to deliver. Due to the sensitive nature of administering surveys, doing so will require additional internal dialogue amongst AidData staff before this tool is fully operational.

Foundational Documents:

Indicator 3.3.1, and corresponding "Foundational Documents" worksheet in the Master Workbook, still requires AidData staff to identify a list of "Target Institutions" that can be searched on in the process laid out in the Data Collection Plan. Additionally, AidData staff need to examine the variables that are currently included in the data collection table on the "Foundational Documents" worksheet and edit variables if needed.

Google Forms:

There are several outstanding items related to the structure and dissemination of the three Google Forms concerning indicators 1.2.1, 1.2.2, and 1.2.3. First, AidData staff needs to amend the forms and appropriate worksheets to disinclude data collection for "follow-up items" per the discussion on 12/9/13. Second, each form should have a brief description included at the top of the document that assists users in understanding which form they ought to be filling out. Descriptions will include examples of events that are covered under the purview of each form. Finally, AidData staff will continue to discuss whether the forms and data collection for "Consultancy Activities" and "Organized Professional Events" should remain separate or be combined. If it is determined that these two forms should be combined, AidData staff will need to physically combine the two corresponding forms and worksheets, as well as amend the process for data collection and transportation to the Master Workbook.