

Mixed methods

in monitoring and evaluation of development projects: learning from the experience of practitioners

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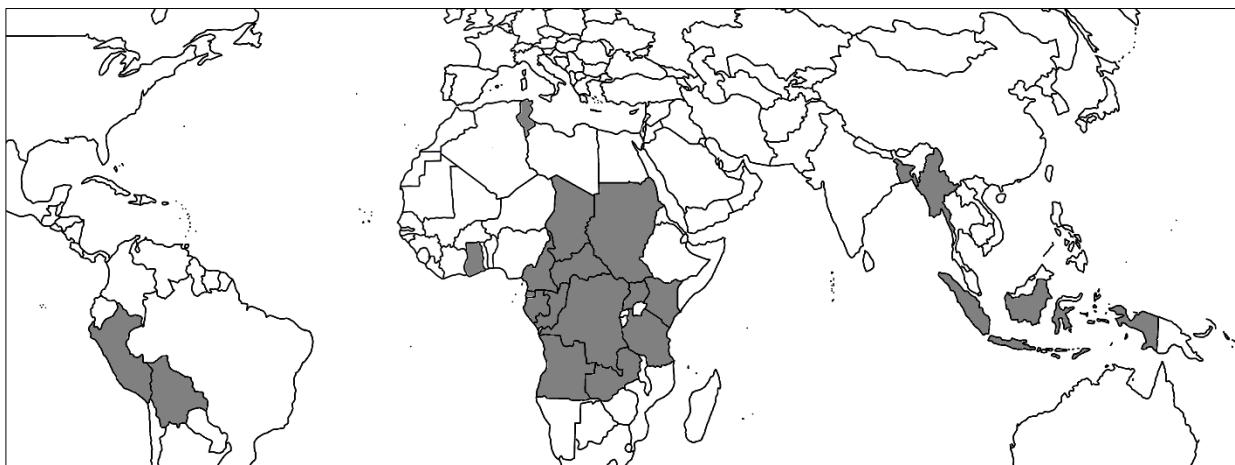
List of acronyms

CBI	Center for the Promotion of Imports from Developing Countries
CORIP	Cocoa Rehabilitation and Intensification Programme
D4D	Dairy for Development
DEK	WUR, Department of Social Sciences, Development Economics
DFI	Development financing institution
ESE	Erasmus School of Economics
GBV	Gender-based violence
M&E	Monitoring and evaluation
PRIME	Pioneering Real-time Impact Monitoring and Evaluation
PUM	Netherlands Senior Experts
QUAL	Qualitative
QUANT	Quantitative
RVO	Rijksdienst voor Ondernemend Nederland / Netherlands Enterprise Agency
SDC	Swiss Agency for Development and Cooperation
SMEs	Small and medium-sized enterprises
SN4A	Sustainable Nutrition for All
WEMAN	Women's Empowerment and Mainstreaming Programme
WCDI	Wageningen Center for Development Innovation
WEcR	Wageningen Economic Research
WUR	Wageningen University & Research

1. Introduction

This paper explores the practical implications of using mixed methods for monitoring and evaluation (M&E) of international development projects, based on experiences of development researchers and practitioners. It shares lessons and insights that resulted from a three-day joint learning experience involving diverse researchers and practitioners from Wageningen Center for Development Innovation and Wageningen Economic Research, both part of Wageningen University & Research, and researchers from the Impact Measurement and Knowledge team at Oxfam Novib. The seven participating experts each contributed a case study on applying mixed methods for monitoring or evaluation, covering development projects from across the world and in a wide range of sectors and themes. The seven case studies form the basis of this paper.

Figure 1 Spread of mixed methods case studies over regions, sectors and themes



Project	PRIME	"DFI"	CORIP	D4D	SN4A	WEMAN	"GBV"
Country	Peru, Uganda Bangladesh Myanmar, Indonesia, Bolivia	Central Africa, Great Lakes region	Ghana	Indonesia	Zambia, Uganda	Rwanda	Tunisia
Sector	Agriculture, Tourism	Multiple sectors (trade, services, agri- business)	Cocoa	Dairy	Agriculture	N.A.	N.A.
Theme	Private sector development	SME investment fund	Sustainable intensification	Farmer livelihoods	Food security	Gender	Gender
Client	CBI, PUM	DFI	Solidaridad	RVO	SDC	Oxfam	Oxfam

Chapter 2 deals with the theory behind mixed methods approaches and why they can be useful. Chapter 3 introduces the seven case studies, showing how they integrated mixed methods in their design, implementation and usage of findings. Chapter 4 analyses the case studies, identifying and discussing six success factors. Chapter 5 provides recommendations, and chapter 6 offers concluding remarks.

2. Theory: why use mixed methods?

This chapter introduces the concept of mixed methods and explains why it is interesting to use mixed methods M&E of development projects. Sub-section 2.1 provides definitions, 2.2 categorizes common mixed methods designs, 2.3 explains in general the motivation for using mixed methods approaches, and 2.4 looks at why they are particularly interesting for development projects.

2.1. Defining mixed methods

Mixed methods is a methodological orientation which combines qualitative and quantitative approaches, aiming to capture the benefits of both. Tashakkori & Creswell (2007) define mixed methods research as:

'...research in which the investigator collects and analyses data, integrates the findings and draws inferences using both qualitative and quantitative approaches or methods in a single study or a program of inquiry' (Tashakkori & Creswell, 2007, p.4).

According to most definitions, mixed methods research requires more than merely the parallel use of qualitative and quantitative methods – they need to be integrated in ways that complement and strengthen each other:

'...its central premise is that the use of quantitative and qualitative approaches, in combination, provides a better understanding of research problems than either approach alone' (Creswell & Plano Clark, 2007; p.5).

Mixed methods research has three essential characteristics. First, it collects and analyses *rigorously* both qualitative and quantitative data. Second, it *mixes* these two forms of data, whether by combining them sequentially, having one build on the other, or embedding one within the other. Third, it uses both methods in either a single study or multiple phases of a programme or study.

2.2. Mixed methods research designs

As these definitions suggest, there are many ways to do mixed methods research. Creswell & Plano Clark (2010) developed a framework which identifies five main designs:

1. *The convergent parallel design.* The research starts out with implementation of qualitative and quantitative methods in parallel use, with equal priority. While both qualitative and quantitative methods are implemented independently from each other during the analysis, at the end of the research the results of both methods are converged and interpreted together to draw conclusions.
2. *The explanatory sequential design.* This mixed methods design happens in two stages. Quantitative data has the priority in this design. It is collected and analysed in the first stage. In the second stage, qualitative data is collected and analysed to help interpret and explain the quantitative results.
3. *The exploratory sequential design.* This design uses a sequential timing as well. However, it prioritizes qualitative data, collecting and analysing it in the first stage. Quantitative data is collected in the second phase, and the researcher interprets how the quantitative results build on the qualitative results.

4. *The embedded design.* Both quantitative and qualitative data are collected in a design that is predominantly either quantitative or qualitative. In other words, the research is designed either to add a qualitative element to a predominantly quantitative design, or a quantitative element to a predominantly qualitative design.
5. *The multiphase design.* This design combines sequential and concurrent strands of mixed methods research over a period of time: the qualitative and quantitative methods are spread out over separate phases of the research, and the results of one phase are used as an input for the next.

2.3. Motivations for using mixed methods

From the literature (Johnson et al, 2007; Creswell & Plano Clark, 2010) we can distil a range of general motivations for using mixed methods approaches.

First, mixed methods research can offset the individual weaknesses of qualitative and quantitative research. Adding qualitative methods might compensate for lack of attention to context, participation or voice in quantitative research. Adding quantitative research can address weaknesses in qualitative research such as dependence on researcher interpretations and difficulty in generalizing from the findings.

Second, using both qualitative and quantitative methods provides more evidence for answering a research question than using one type of method alone. More data collection tools are available to the mixed methods researcher than a researcher restricted to one method.

Thirdly, using qualitative and quantitative methods together can answer a broader array of research questions than either alone. Mixing methods provides better insights into the complexity of questions researchers ask themselves.

Fourthly, mixed methods approaches can bridge the divide between quantitative and qualitative researchers, preventing the narrowing of approaches and increasing opportunities for collaboration.

Finally, mixed methods research allows researchers to use a broader range of paradigms or worldviews to understand the realities they investigate, helping to avoid the narrowing of research opportunities to options that are available from one paradigm or worldview only.

2.4. Added value of mixed methods in development research

Some of the literature points to more specific motivations for using mixed methods approaches in M&E of international development projects (Ton, 2012; Ton, 2015):

- Development organizations face increasing pressure to prove the worth of aid money. They need to show the impact of development projects and their contribution to different pathways of change. Addressing these complex questions requires a broad toolkit in which qualitative and quantitative methods complement and support each other.
- Development researchers face competing demands: for rigorous impact stories to prove the contribution of development efforts, and for utilization-focused, context-specific and participatory M&E. This requires

researchers to look beyond one strand of research and combine the strengths of qualitative and quantitative research.

- The role of context is paramount: When researching something as specific as the impact of a specific development intervention, so researchers need to complement quantitative surveys with qualitative interviews to get a more holistic picture of the setting in which changes have been taking place.
- There is an especially stark divide in development research between researchers focused on rigorous research with a counterfactual, and researchers focused on participatory research and the importance of context. Mixed methods approaches could help provide opportunities for collaboration between these different schools of development research.

These motivations highlight the added value of using mixed methods for monitoring and evaluating development projects. The next chapter will look into seven case studies from our own experience, where mixed methods were applied for monitoring or evaluating development interventions.

3. Results: mixed methods in practice

This chapter assesses the design, implementation and utilization of mixed methods in seven cases. Sub-section 3.1 introduces the seven cases in terms of their focus area and geographical spread, 3.2 shows why a mixed methods design was chosen in each case, 3.3 describes how the approach was implemented, and 3.4 reflects on the uptake of the findings .

3.1. Overview of case studies

One of the commonalities of the researchers and practitioners involved in writing this paper is their work in the development sector and in low- and middle-income countries. Consequently, all cases included were chosen among work done as part of development cooperation. As the purpose was to learn from experience, we chose cases which vary in themes, countries and mixed methods design.

Table 3.1 shows the main aspects of the selected cases. Six were related to the food and nutrition security sector and one about gender-based violence. Of the six cases related to the food and nutrition security sector, two looked at improving food and nutrition security, two targeted small and medium-sized enterprises (SMEs), and two were on commodities – cocoa and milk.

Most cases were in Africa, some in fragile contexts. Some were internal evaluations and others external: Oxfam Novib's two cases, evaluating projects implemented in collaboration with Oxfam country offices, can be considered as internal; WUR implemented their evaluations for external clients, from the private sector (Friesland Campina), the public sector (CBI) or a network (Solidaridad West Africa).

Two of the seven cases were time-limited – one baseline (CORIP) and one ex-post evaluation (DFI) – while the other five were implemented throughout the project cycle.

Table 3.1 Overview of the selected cases

Case	Theme	Countries	Organizations involved	Timeline
PRIME	SMEs in agriculture, tourism, processing	Uganda, Bangladesh, Myanmar, Peru, Indonesia, Bolivia	CBI (public sector): funding PUM (non-profit): funding WECR (knowledge institute): implementation ESE (knowledge institute): implementation	Impact study spread over several years (2013-2017)

DFI	SMEs in multiple sectors (trade, services, agribusiness)	Central Africa, Great Lakes region	DFI (private sector): funding WEcR (knowledge institute): implementation	Five-month ex-post evaluation in 2018
CORIP	Cocoa production	Ghana	Solidaridad West Africa (network): project manager and study commissioner University of Ghana (knowledge institute): implementation WCDI (knowledge institute): implementation	Baseline study – 11 months from design to finalization of report (2015-2016)
D4D	Dairy farmers livelihood	Indonesia	RVO (public): funding Friesland Campina and Friesian Flag Indonesia (private sector): project partners WCDI and DEK (knowledge institute): implementation BOI consultancy Jakarta (private sector): implementation	Monitoring, learning and evaluation package spread over several years (2013-2018) including baseline, midline and endline

SN4A	Food and nutrition security	Zambia and Uganda	SDC (public sector): funding	Monitoring, learning and evaluation package spread over several years (2015-2017) including community mapping, baseline, endline, joint sense making and learning events
WEMAN	Food and nutrition security, livelihoods	Rwanda	Oxfam Rwanda (non-profit): implementation and study commissioner	Baseline and endline studies between 2015 and 2018 including learning events
GBV	Gender-based violence	Tunisia	Oxfam Tunisia (non-profit): implementation and study commissioner Oxfam Novib (non-profit): implementation	Endline in 2015

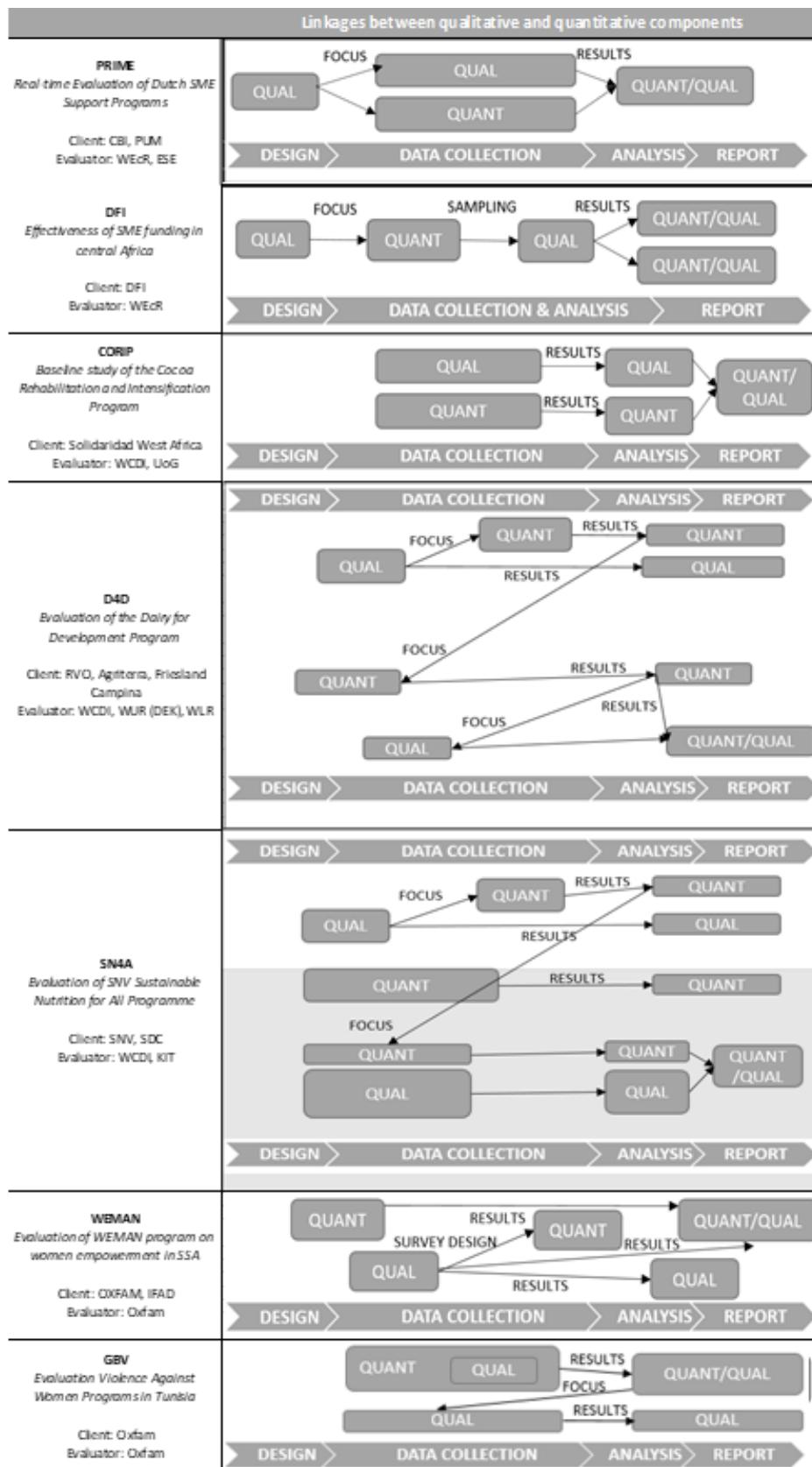
3.2. Mixed methods in research designs

All seven cases chose a mixed methods design based on the complexity of their research question and their resource constraints, in terms of money and time. With a sample of only seven cases, we cannot conclusively link the combination of characteristics with the decision on the type of mixed methods design. Instead, we describe the design choices and reasoning behind them, showing the diversity among the seven cases.

Figure 3.1 visualizes the mixed methods designs for the seven cases, showing how insights from one research trajectory were integrated into the design and preparation of a subsequent trajectory or combined with the outcomes of another trajectory during analysis, interpretation and/or reporting. The integration or combination happens in various forms and phases, but it is possible to distinguish the categories introduced in Chapter 2.2.

Three cases took an exploratory sequential approach, using one element to narrow down the other: the DFI case used quantitative research to determine the scope of sampling for qualitative research, while SN4A and WEMAN used qualitative research to design data collection tools for quantitative research. WEMAN also had an element of the explanatory sequential approach, along with GBV and D4D, using qualitative research to interpret findings from quantitative research or vice versa. They also brought together the two elements in a synthesis, which is characteristic of convergent parallel design. PRIME and CORIP used the qualitative and quantitative results to triangulate, cross-check and validate.

Figure 3.1 Visualization of the mixed methods designs of the seven cases



3.3. Utilization of mixed methods evaluations

Mixed methods designs are often chosen in complex evaluations. They mitigate the risk of oversimplifying reality and ensure a complete picture of programme impact and effectiveness. We assume that the depth of analysis also leads to a stronger uptake of the findings to inform strategic decision making, but it is challenging to show this effect: in our experience, how the findings of evaluations are used is rarely documented transparently. With that in mind, we think our experiences with utilization of our mixed methods research are a helpful source to show the added value of mixed methods evaluations.

Mixed methods evaluations can cover various parts of the theories of change we encounter in our work. For example, in the case of D4D the evaluation covered multiple aspects of a dairy project, from quantitative measurement of quality standards to changes in livelihoods of farmers and the management of cooperatives. This comprehensive approach ensures that the evaluation reflects the complexity of change and the different levels that influence it.

Combining information from quantitative and qualitative research gives a more comprehensive picture of a programme's contribution to varies types of (social) change. Mixed methods evaluations help strategic decision making by providing generalizable figures on the factual elements of change and in-depth understanding of the mechanisms of change.

Alternating between asking open (qualitative) and closed (quantitative) questions helps with understanding the extent of change, unintended effects and the bigger picture of the process change. Mixed methods have a clear benefit for learning how to improve programme activities and strategic direction – one of the purposes of the evaluation in all the cases. For example, the GBV case evaluated a Tunisian radio show's contribution to ending violence against women: findings of a randomized controlled trial identified a strategic direction for future programming, while at the same time the qualitative interviews with listeners pointed towards ways to tweak the content of the discussion groups within the shows. This demonstrates how evaluations aligned with programme implementation can use alternation of methods to learn and adapt while implementing.

As they are able to address broad theories of change, mixed methods evaluations can be informative for different types of audiences who want to use the results of the evaluation for different purposes. Our cases show a huge variety in actors involved in the evaluations, from international donors to local implementers, private sector actors and politicians. All have their own purposes: some are more interested in numbers, while others want to know the stories behind them; some want to use the evaluation for accountability, others for adaptive management.

For example, in the CORIP case the evaluation audience consisted of an international NGO, private sector actors and smallholder farmers involved in cocoa production. The NGO was primarily interested in decent work and quality of production, the private actor actors were focused on the quantity of production that met quality standards, and the smallholder farmers wanted to secure their livelihoods. The mixed methods evaluation contributed to better understanding among all these actors about the complexity of change.

4. Analysis: success factors in using mixed methods

During the write shop we analysed the seven case studies in detail and identified six factors that influence the success of the design and implementation of mixed methods evaluations and the utilization of their results. This chapter assesses each of them: the values of clients and evaluators (4.1); budget (4.2); timeliness (4.3); capacity of researchers (4.4); task division between partners (4.5); and clients' experience with mixed methods research (4.6).

4.1. Preference for methods

The choice of mixed methods design, implementation and the uptake of results depend on the values of clients and evaluators. When they attach more value to either a qualitative or quantitative way of viewing the world, that will influence the choice of design and the resources (people, time, budget) available for each part of the study. A strong preference for one type of research over the other might hinder the integration between qualitative and quantitative results, leading to one trajectory being downplayed and reducing the added value of implementing a mixed methods study. In the CORIP case, for example, more weight was given to the quantitative part of the study, from design to sense-making.

4.2. Budget

Supporting both quantitative and qualitative research trajectories often requires more budget than supporting just one. This is especially true in sequential designs (e.g. DFI, D4D, SN4A), where one type of data collection takes place before the other, so parallel or embedded designs are often chosen with a view to limiting costs. The degree of integration between the qualitative and quantitative methods depends on the ability to sequence them. High levels of integration require a substantial amount of time for triangulation, cross-checking and integrating the conclusions from both trajectories, all of which implies a larger budget than for single-method studies.

4.3. Timeliness

In any evaluation, timeliness is essential if the results are to be used. In our cases we saw this is especially true when one research component depends on another. In the DFI case, for example, which made use of an exploratory sequential design a tight timescale for the quantitative analysis was respected, enabling its use to inform the selection of interviewees for qualitative data collection. In the GBV case, which used an embedded design, qualitative and quantitative data were collected in the same short timeframe. In contrast, in the WEMAN case, a delay in implementation of the baseline meant that quantitative results from the baseline study were not yet available when the qualitative trajectory had to be kicked-off. Hence, even though the initial idea of the multi-phase design was to base the research question for the qualitative trajectory on the outcomes of the quantitative baseline study, this was no longer possible. Research questions for the qualitative trajectory were in the end formulated without any basis in or reference to the quantitative results. Time constraints were also observed in the D4D, SN4A and CORIP cases.

4.4. Capacity

A mixed methods study requires a mixed set of research skills. As quantitative and qualitative research skills are often not found in the same team, let alone in one individual, at least two individuals or teams need to be recruited. This means the risk of lack of capacity is twice as high as with single-method study. Lack of balance between quantitative and qualitative skills was identified in several cases as having negatively influenced the quality of the study. For example in the CORIP case, the quality of the qualitative data collected was limited and unequal between enumerators. In the D4D case, project partners' limited understanding of mixed methods was one cause of sampling and instrument development taking longer than anticipated.

4.5. Task division

Multiple partners were engaged in all seven cases. Partners are defined as organizations involved in implementing the evaluation, which can include the client. Two types of division of tasks were observed: by activities (e.g. design, data collection – including training of data collectors and monitoring data collection – analysis and reporting), or by content (the quantitative, qualitative or learning part of the study).

In some cases partners were clearly assigned content tasks, either with limited interaction between them (e.g. SN4A) or with good connections between them (e.g. PRIME). When Oxfam Novib, WEcR and WCDI divided tasks by activity, they were always involved in the design but never in all stages, as data collection is often done by local partners. The degree of involvement varied from support (e.g. CORIP) to managing the study (e.g. GBV, D4D). Two approaches – strict division of tasks along content lines with limited connections between partners, and some partners having limited involvement in some activities – were seen to generate challenges in implementation and limitations on partners' ability to use the findings.

4.6. Type of client

The experience of clients with M&E in general, and mixed methods evaluations in particular, varied widely across the cases. In the D4D case, the client had very limited knowledge of M&E. In the case of DFI, the client had a team dedicated to it. More typical were the two cases brought by Oxfam Novib, in which the clients – local Oxfam organizations – were knowledgeable about M&E in general, with more limited knowledge of mixed methods.

Clients, either internal or external, with experience in M&E and interest in mixed methods were often involved in the study – at least in the design phase, often in the validation phase(s) and sometimes in the implementation phase (for example, giving feed-back on the data collection tools and the training of enumerators). Nevertheless, we noticed that often the client is not aware of the implications of using a mixed methods approach, which might result in low expectations for integration between the qualitative and quantitative research methods. Clients with specific knowledge on mixed methods can be more conducive to realizing a strong design with more flexible implementation.

With internal clients, the tighter relationship enhances ability to follow up on utilization of the findings. The cases with external clients ranged from their involvement only in the design and implementation of the mixed methods

assignment (e.g. CORIP, DFI) to being part of a longer-term partnership or being involved in the project (e.g. SN4A, PRIME), making it possible to propose follow-up steps.

5. Three sets of actionable tactics

This chapter outlines the insights gained from analysing our collective experiences with the use of mixed methods for monitoring and evaluating development interventions. Sub-section 5.1 describes actionable tactics for designing a mixed methods evaluation, 5.2 shares actionable tactics for the implementation phase, and 5.3 focuses on insights pertaining to the uptake of findings.

5.1. Actionable tactics for design of mixed methods evaluations

When designing a mixed methods evaluation, make sure to allocate enough time. In particular, for a sequential or multiphase design, leave a buffer between different stages of the research to prevent delays hampering the integration of qualitative and quantitative data.

As a mixed methods study generally requires a higher budget than a single-method study, it is important to keep a close eye on the available resources. Make sure to reserve enough budget for triangulation and cross-checking of quantitative and qualitative results and integrating the conclusions. It might be wise to choose a parallel or embedded design if the budget is limited, as it requires fewer resources than a sequential or multiphase design.

Make sure that the team carrying out the mixed methods evaluation has the right research capacity, including both qualitative and quantitative experts. Adjust your design to the capabilities of the researchers who will carry it out. If needed, train your team in mixed methods, showing them the added value of integrating qualitative and quantitative research approaches. It might be beneficial to appoint someone in the team to take charge of integrating the qualitative and quantitative analysis.

Take care that the different partners involved in the research have their own methodological strengths, are open for communication with other research partners and have been trained on the advantages of using mixed methods approaches.

Pay attention to the values and preferences of the client that assigned the research, and find out which type of research the client is most familiar with. Make sure that the added value of using mixed methods is clear to the client, paying special attention to the complementary value of the methods the client is least familiar with.

Figure 5.1 Actionable tactics during the design phase of a mixed methods study

- Ensure that the planning and design of the qualitative and quantitative data collection and analysis is collaborative and coherent so findings will speak to each other and can be presented together.
- Allocate enough time for integration of qualitative and quantitative data.
- Reserve enough budget for triangulation and cross-checking of findings.
- Make sure the research team is trained or experienced in mixed methods.
- Ensure the research team contains both qualitative and quantitative researchers.
- Consider the methodological preferences of your client(s).

- Make sure your planning accommodates interdependencies between different phases of the research – when one component affects the content or planning of another.
- Make sure you have a financial buffer that can cover for unexpected deviations from the planning.

5.2. What to do during the implementation phase

With different data collection methods depending on each other, ensuring that methods are mixed in a meaningful way requires complex planning. It is important to monitor closely and adjust strategy if it seems likely that implementation will be limited or delayed. In particular, make sure there is enough time in the planning to carry out sequential or multi-phase mixed methods evaluations, which are more prone to delays.

Ideally, one research partner would carry out both the qualitative and quantitative research, but it can be a challenge to find partners who can do both well: in practice, one of the methods can be compromised as researchers are better equipped in one method than the other. It is more difficult to come to a clear understanding of change with research partners when more disciplines are involved: there are trade-offs in how to present data, what results to show and how. Combining different paradigms in a rich, complete and rigorous way requires openness and willingness to discuss and reflect.

Open communication between teams and their members is essential throughout implementation: the mixing of methods is facilitated by sharing tasks. Make sure there is plenty of communication and ways for the partners to exchange information.

Successful mixed methods evaluations take the different actors in the programme by the hand to explain the purposes of the methods and their uses. Involving the client in implementation can inspire them to explore the full potential of the possibilities of mixing methods.

Figure 5.2 Actionable tactics during the implementation phase of a mixed methods study

- Closely monitor the planning and adjust strategy when delays are likely.
- Ensure enough time in the planning for sequential or multi-phase designs in particular.
- Work with research partners with experience in qualitative and quantitative research.
- Make sure the quantitative and qualitative researcher(s) closely coordinate throughout the work.
- Ensure open and regular communication between research partners and team members.
- Build a strong relationship with the client, explaining the purpose of each method upfront.
- Make sure your research partners master both qualitative and quantitative methods.

5.3. How to facilitate the uptake of findings

Regular and repeated reflection among programme staff on both the quantitative and qualitative research findings helps to support the relevance of analysis and stimulate the uptake of findings. There must be adequate mixed methods capacity in the evaluation team if the study is to deliver better results than a one-method evaluation.

The client's expectations must be managed. Open communication with the client throughout the study – from design to utilization – helps to ensure the client owns the study. Consider the client's preferences for qualitative or quantitative methods when presenting the results, and show how the less-valued method complements the other.

In the cases where uptake and use of the findings were high, there was regular interaction between the client and evaluator team and between the quantitative and qualitative researchers. There are different ways to involve the client, from decision making to integration in the roll-out of the study, to increase their ownership over the study and interest in using the results.

Figure 5.3 Actionable tactics to facilitate the uptake of findings of mixed methods evaluations

- Manage the client's expectations about the type of results you will deliver and reflect regularly with the client on both the qualitative and quantitative results.
- Invest in the quality and capacity of the research team to deliver good results.
- Make sure quantitative and qualitative researchers interact with each other and organize their work coherently.
- Share and discuss findings as they emerge from the various components.
- Prioritize collective reflection time even if this shortens individual production time.

6. Concluding remarks

This paper has explored the practical implications of using mixed methods for M&E of international development projects, and formulated actionable tactics for the design, implementation and utilization of mixed methods evaluations. The insights it has shared are the result of a joint learning experience between researchers and practitioners from Wageningen University & Research and researchers from the Impact Measurement and Knowledge team at Oxfam Novib.

In summary, our analysis showed that mixed methods studies require more resources (time, money and capacity) but provide a more diversified and realistic understanding of the programme being evaluated – it is rarely possible for one method to capture the complexities of a development programme. Applying mixed methods increases the understanding of how change happens and the credibility of an evaluation, leading to more versatile and concrete programme recommendations that support learning and knowledge co-creation for current and future programming, and potentially enhancing the impact of development practice.

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