

Proportionate evaluation

06/05/2026

Laura Fowler

Evaluation Manager



EngineeringUK

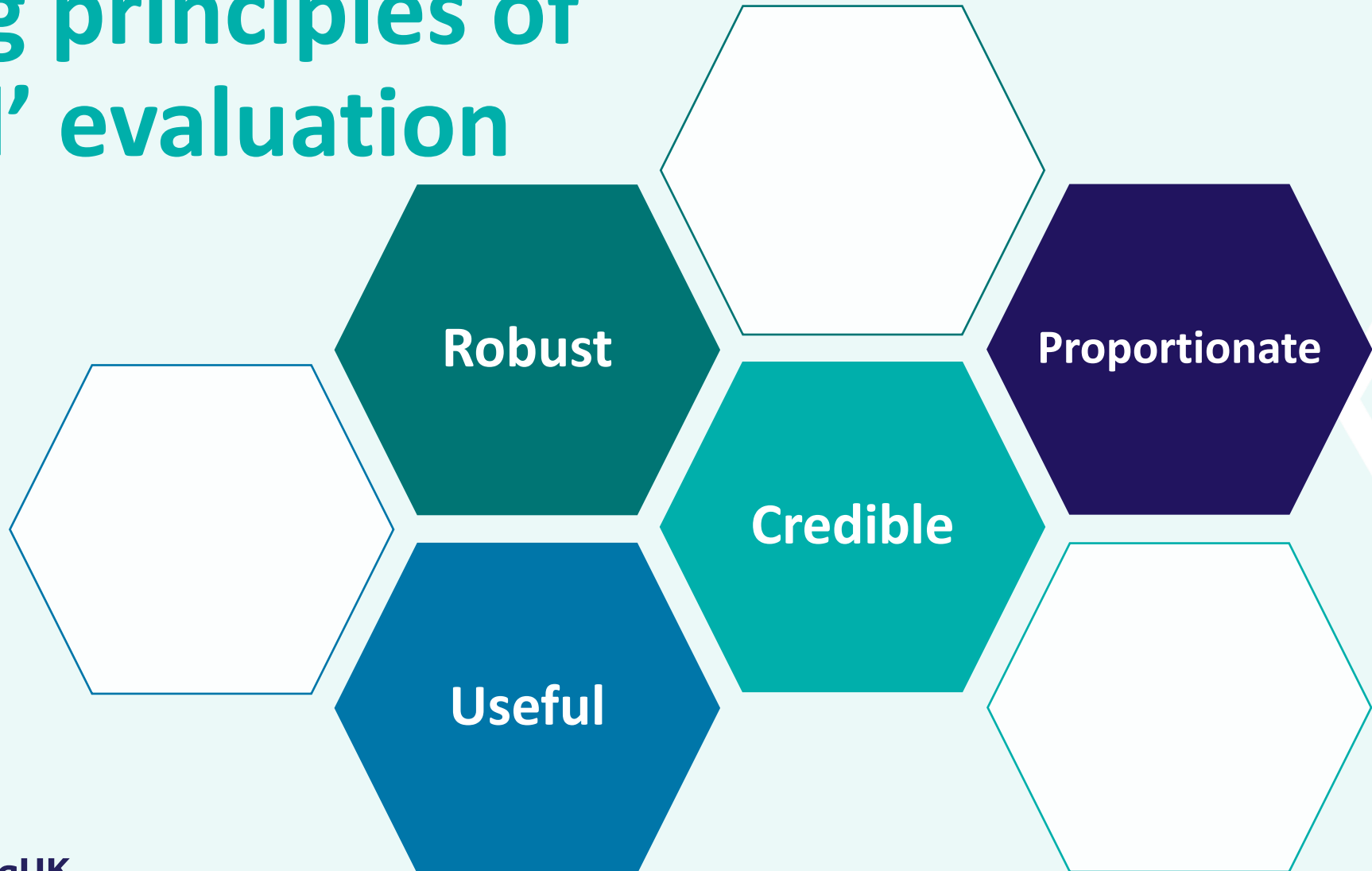
INSPIRING FUTURES TOGETHER

Aims of today's session:

- understand principles associated with a 'good' evaluation
- understand what a 'proportionate evaluation' is
- identify the different 'levels' of evaluation
- know top tips for picking evaluation methods most useful to your organisation

What is a 'good' evaluation?

Guiding principles of a 'good' evaluation



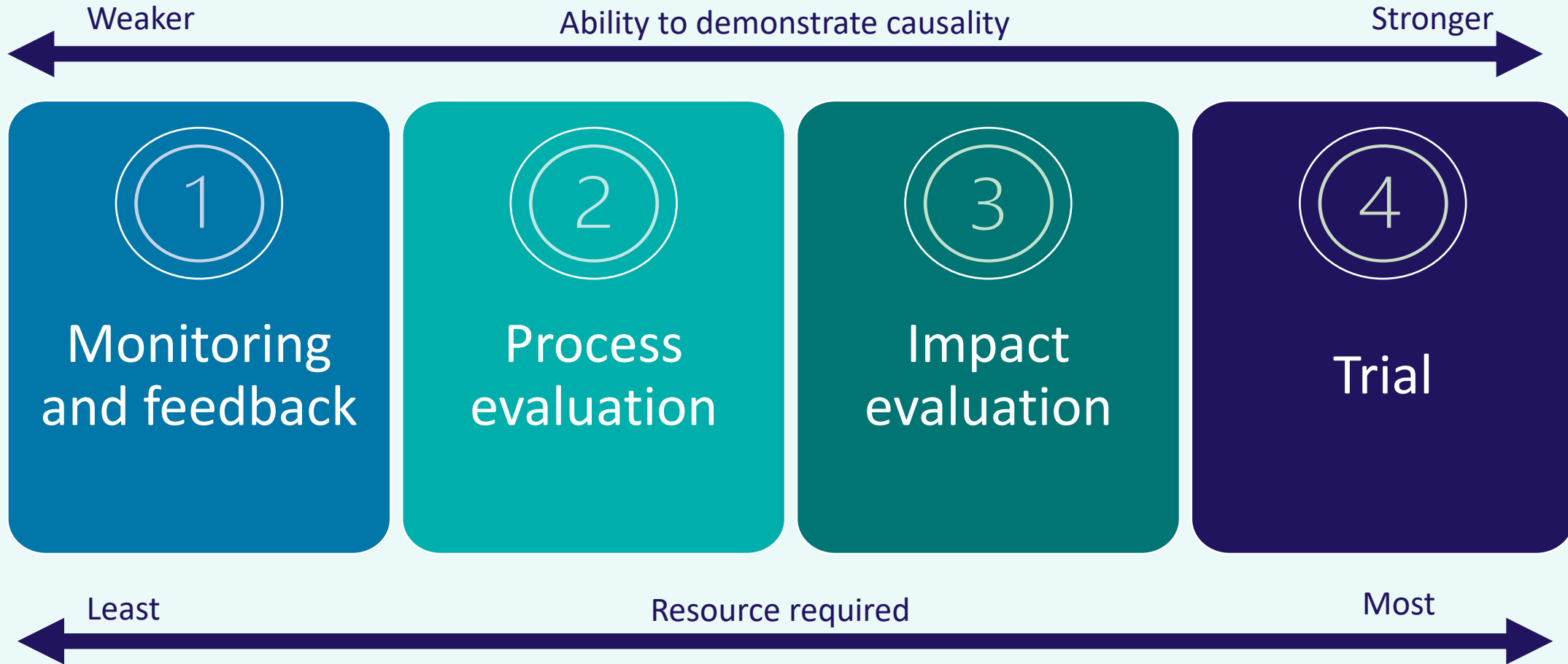
What is proportionate evaluation?

‘Fit-for-purpose evaluations that are genuinely useful to decision makers.’

(Magenta Book, 2020)

An approach where the scope, depth, and methods of evaluation are matched to the size and purpose of an intervention — so that the effort involved is justified by the decisions it needs to inform

The levels of evaluation



1. Monitoring and feedback

What's this?

Collecting basic information on delivery and participants' experience to understand what is happening and identify improvements for delivery.

When should I use this?

When an intervention is small, or in its early development stages and you want to improve delivery rather than measure outcomes.

What methods could I use at this level?

Feedback surveys, interviews, focus groups, attendance data, monitoring reach.

2. Process evaluation

What's this?

Examining how an intervention was delivered and what helped or didn't help its implementation.

When should I use this?

When you want to understand how delivery worked in practice, especially when refining or scaling a programme.

What methods could I use at this level?

Interviews, focus groups, staff reflections, surveys, observations.



3. Impact evaluation

What's this?

Assessing impact by measuring change in key outcomes in a robust sample.

When should I use this?

When you need to understand whether your work made a difference for participants or outcomes.

What methods could I use at this level?

Pre/post surveys, retrospective pre–post surveys, follow-up surveys, pre/post interviews or focus groups, comparison groups, analysis of secondary data (e.g. subject choices), structured observation tools.



4. Trial

What's this?

Testing whether an intervention directly caused change by comparing it to what would have happened otherwise.

When should I use this?

When you need strong evidence of effectiveness to support major decisions like scaling, funding, or policy.

What methods could I use at this level?

Randomised control trials (RCTs), qualitative data to support interpretation of findings.

Choosing an appropriate level

Level	Appropriate when...	Not appropriate when...
Monitoring and feedback	<ul style="list-style-type: none">• piloting a new intervention• the intervention is light touch or involves a small number of participants• there is no, or limited, information on whether the intervention works	<ul style="list-style-type: none">• needing to demonstrate causality
Process evaluation	<ul style="list-style-type: none">• needing to understand more about how the intervention works• developing an initial understanding of what type of impact the intervention may be having, including when this isn't yet clear	<ul style="list-style-type: none">• needing to demonstrate causality• the intervention is light touch
Impact evaluation	<ul style="list-style-type: none">• needing to understand the difference the intervention made to different population groups, if sample size allows• data can be collected before and after the intervention• methods include pre/post surveys, follow up surveys, focus groups, pre/post interviews, structured observation tools	<ul style="list-style-type: none">• the impact expected is unknown• the intervention changes over time• the intervention is light touch• needing to understand and improve the quality of delivery is prioritised
Trial	<ul style="list-style-type: none">• needing to demonstrate a causal link between the programme and the outcomes• the delivery of the intervention doesn't change• random allocation is possible	<ul style="list-style-type: none">• delivery of the intervention varies and is light touch• interaction between a control and experimental group is expected• the intervention is delivered in a complex context

How to be proportionate with your evaluation?

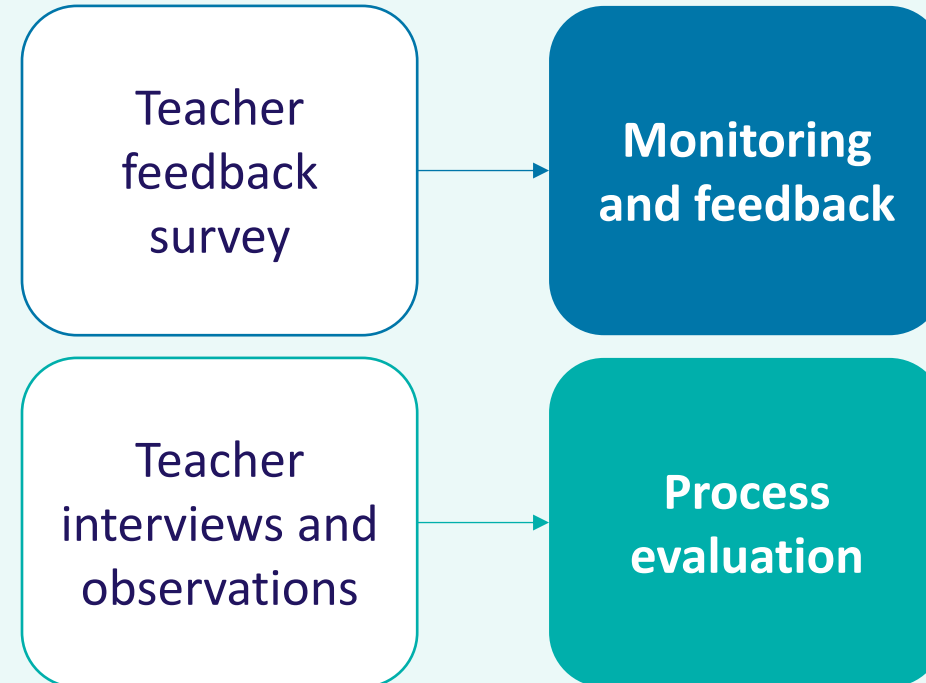
Consider

- what stage is your intervention at?
- how much resource do you have for this evaluation?
- how long is your intervention? is it light touch? is it a one-off?
- who would be most useful to hear from?
- what data do you need to collect?

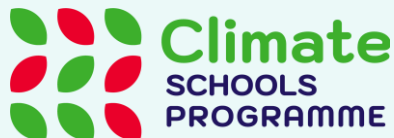
Example: Climate Schools Programme

Year 1 – pilot year (2023/24)

Stage	Pilot
Resources	In house evaluation team
Length of intervention	Multiple resources
Who	Teachers and the programme teams
What data to collect	<ul style="list-style-type: none">• whether the resources were fit-for-purpose• how they were delivered• how resources could be improved



EngineeringUK

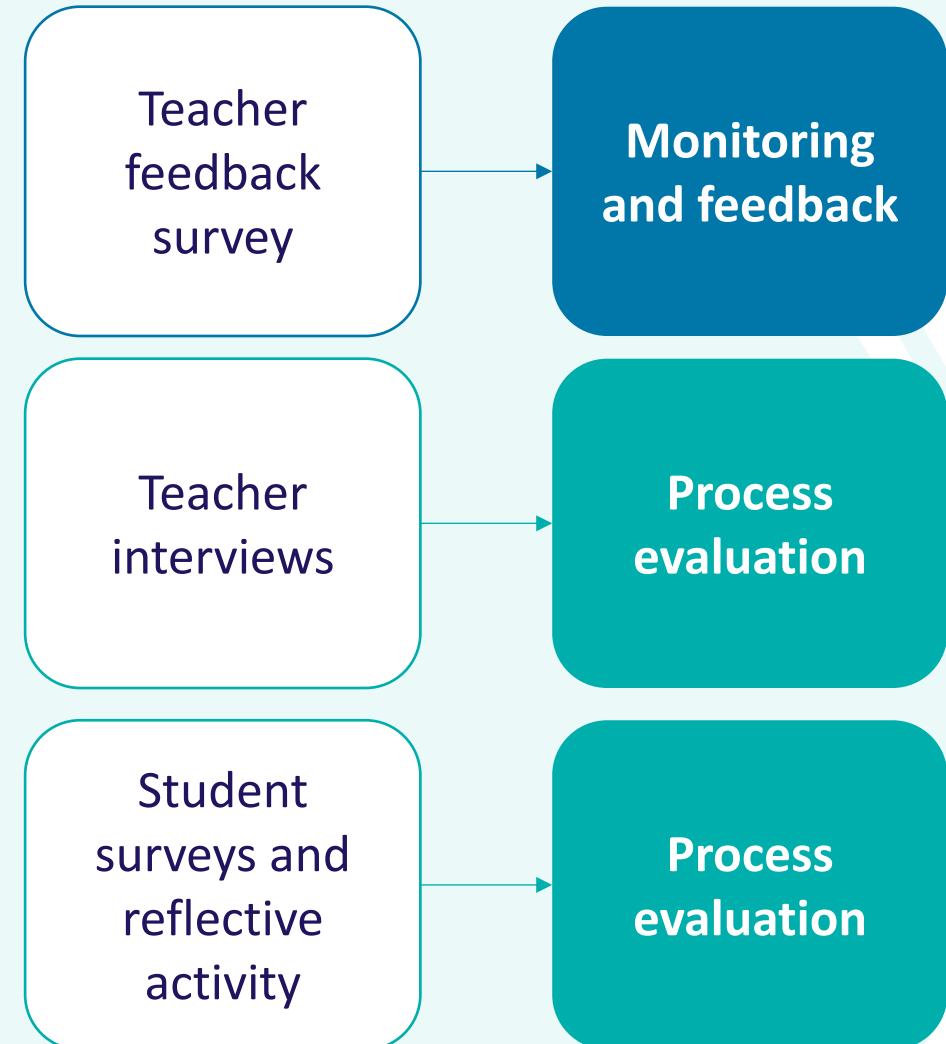


Climate
SCHOOLS
PROGRAMME

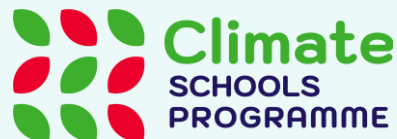
Example: Climate Schools Programme

Year 2 – refinement of programme (2024/25)

Stage	Refinement
Resources	In house evaluation team
Length of intervention	Multiple resources
Who	Teachers, students and the programme teams
What data to collect	<ul style="list-style-type: none">• whether the resources were fit-for-purpose• how they were delivered• how resources could be improved• impact of resources on students



EngineeringUK

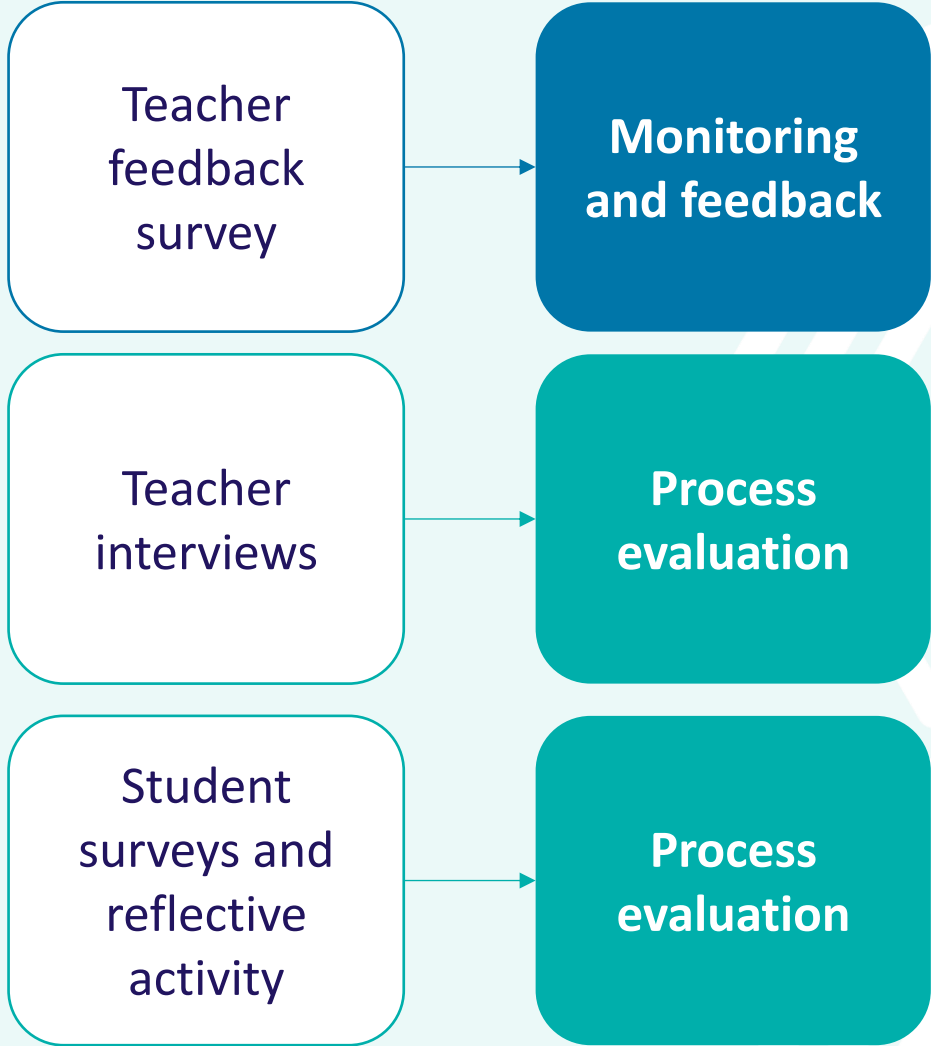


Climate
SCHOOLS
PROGRAMME

Example: Climate Schools Programme

Year 3 – established programme (2025/26)

Stage	Established programme
Resources	In house evaluation team
Length of intervention	Multiple resources
Who	Teachers, students and the programme teams
What data to collect	Larger sample size: <ul style="list-style-type: none">• whether the resources were fit-for-purpose• how they were delivered• how resources could be improved• impact of resources on students



EngineeringUK



Climate
SCHOOLS
PROGRAMME

Top tips

- start by creating/ reviewing your Theory of Change
- consider what data you need to collect, what resources you have, and what stage your intervention is at
- create an evaluation plan using the evaluation levels – if you're unsure, start smaller and build up over time
- review and reflect on your approach frequently



Key takeaways!

There is no 'one size fits all' in evaluation approach

Follow the 4 guiding principles to plan your evaluation

Any questions?

Reflections from the session