**When research and evaluation collide (…we mean collaborate)**

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| **Issues that have come up in our collaboration** | **What we did** | **How that worked** |
| Before the project was funded, funder requested that the research questions be revised to fit program officer interests; new research questions had greater potential overlap with the evaluation questions | Changed research questions to meet funders’ expectations (didn’t have much leverage!)  Research and evaluation teams (and clients) had multiple conversations to discuss questions and methods | Decided evaluation and research would take different approaches to the study of scale-up, with research delving deep into less understood areas of the program and evaluation focusing on outcomes and developmental methods. |
| Evaluation team and researcher each had an existing professional relationship with clients (but not with each other) | Had a two-day in-person planning meeting shortly after the project began: first day was just the research and evaluation teams; the second day included the clients | Successful. There’s nothing like face-to-face communication, if it’s feasible. |
| Sharing data | Use OneNote software as a repository for all of our documents (including meeting notes, drafts and final versions of instruments, data, and reporting) | Has been very useful for the evaluation and research teams, when technology cooperates  Had planned for clients to also access and use OneNote; instead we send documents by attachment or use Google docs |
| Data analysis | Split the data between surveys and interviews; evaluation took up surveys, and research took up coding, and shared data files with evaluation. | Different software made collaborative coding difficult across teams—moving towards low cost online data analysis system |
| How to most efficiently and effectively stay informed and coordinate our efforts | Joint calls with research, evaluation, and client with side communications only when a deliverable is truly applicable to only one party  Introduction of research/evaluation manager within client organization creates streamlined communication path  Have combined research/evaluation team meetings (first bi-weekly, now monthly); share notes with to dos highlighted by team | Having joint calls has helped ensure we’re all on the same page  However, not everyone participates in every meeting, so still need to communicate with rest of the evaluation & research teams |

**Questions for Reflection**

* Is there anything we shared that particularly resonated with you?
* Have you had any personal experience with formal or informal collaborations between social science researchers and evaluators? What was your experience like?
* What are some of the benefits associated with having both research and evaluation teams on the same project?
* What are some of the challenges associated with having both research and evaluation teams on the same project?
* Social science researchers and evaluators often bring different theories to bear when designing data collection and analyzing data. In what ways might these differing theories be complementary? How might they interfere with one another? In what ways might evaluators and researchers develop strategies for analysis that support cooperation?
* What strategies have you found useful when communicating findings, particularly when research and evaluation are both taking place?

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Notes:

The intersection between evaluation and research is complicated: some audience members do research on evaluation, some are evaluators doing research, and some can be the evaluator and researcher on a project.

Design-based implementation research or applied research can look like evaluation and have similar purposes. NSF and IES are willing to fund “research” that is made up of an iterative design where researchers collect data to help inform a program and make program decisions. TO the evaluators, this sounds very much like formative evaluation feedback.

There are blurred lines between evaluation and research. For example, some IRBs consider studies research if findings are generalizable (but evaluations can be, while researcher is not necessarily so)

For an audience member who serves on an IRB at her institution: “If it’s meant to be disseminated to the public, it’s research.”

Research can be about value and worth of an approach (not necessarily of a program)

Evaluation has a client and stakeholders while research may not.

An audience member brought up a potential topic for Year 3- Find agency folks that came up with these guidelines to differentiate research and evaluation so we can hear how those were created and how they are being interpreted.