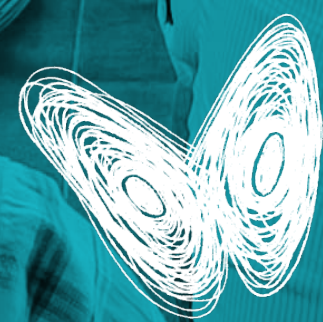




An Introduction to
Adaptive Evaluation



IMAGO
Global Grassroots

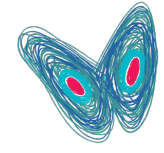


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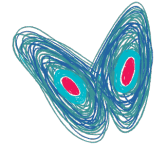
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3

Value Add

What are the benefits of using Adaptive Evaluation?





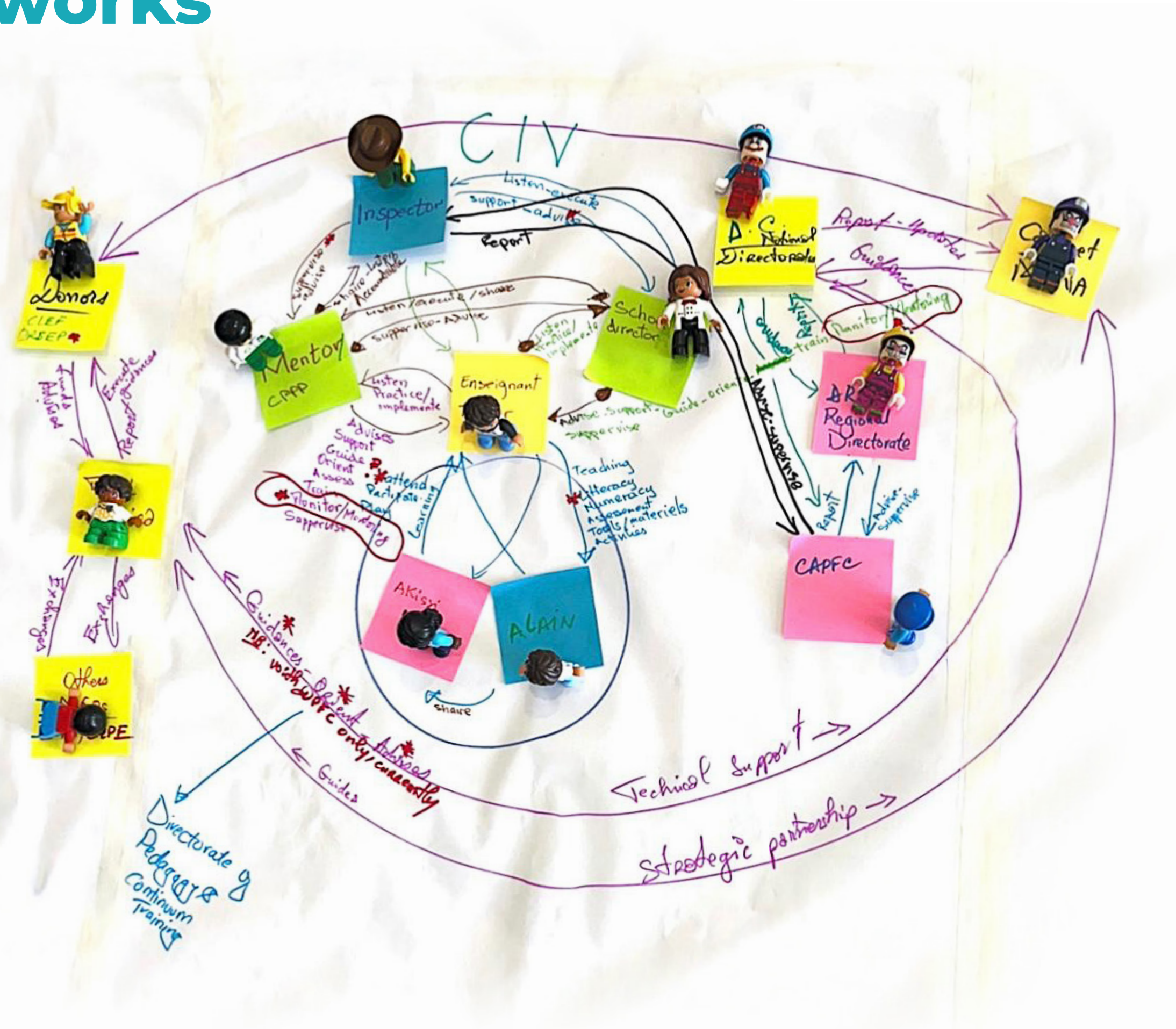
Introduction

A better way to learn, improve, and scale what works

Scaling impact means strengthening systems to improve people's lives while learning and adapting in real time.

At Imago Global Grassroots, we use Adaptive Evaluation (AE) to accompany organizations on this journey. AE is a learning-centered methodology that helps teams understand how change happens in complex systems, test ideas in real contexts, and adapt strategies as evidence emerges.

Rather than assuming linear progress, AE recognizes that change unfolds through relationships, incentives, behaviors, and power dynamics, and that learning must happen alongside action. AE has been road-tested - we have applied it in 20+ organizations in gender, health, education, and livelihoods in India, Africa, and Latin America.



Adaptive evaluation's primary purpose is to support innovation and scaling in complex systems where learning and adaptation are essential.

This companion piece offers a friendly introduction to Imago's approach to Adaptive Evaluation. For those seeking full guidance, tools, and exercises, our **Adaptive Evaluation Technical Toolkit** provides detailed instruction on applying the methodology directly [here](#).

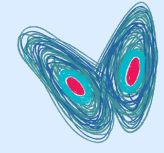




1

Definition

What is
Adaptive Evaluation?



What Is Adaptive Evaluation?

1 Definition

Adaptive Evaluation is a process and methodology designed to help teams understand, test, and improve solutions as they scale within complex systems.

At Imago, we think of Adaptive Evaluation in three interconnected stages (see cycle diagram on the right).

Each stage builds onto the next and has associated approaches and techniques. Understanding the system helps embrace the complexity of real development work. Understanding the solution helps outline the processes and mechanisms that will help move the needle in the system, including which parts of the process are working (or not). Finally, learning and iteration help learn and adjust in specific areas of improvement.

The approaches mentioned (System Actor and Dynamic Mapping, Process Tracing, and Agile for Grassroots) can be explored further in our [Adaptive Evaluation Technical Toolkit](#), a comprehensive AE resource for evaluators.

2 Process

3 Value Add

5

1 Understanding the system, including understanding how the system works, and diagnosing what is causing the system to remain resistant to change.

- **How does the system function?**
- **What is reproducing the problem?**
- **Do we need to change the system or work within the existing system?**

Associated approaches and techniques:
System Actor and Dynamic Mapping

3 Learning and iterating to improve the solution, including co-creating ideas for improvement in areas identified, testing them as prototypes, and using learnings to redefine the problem.

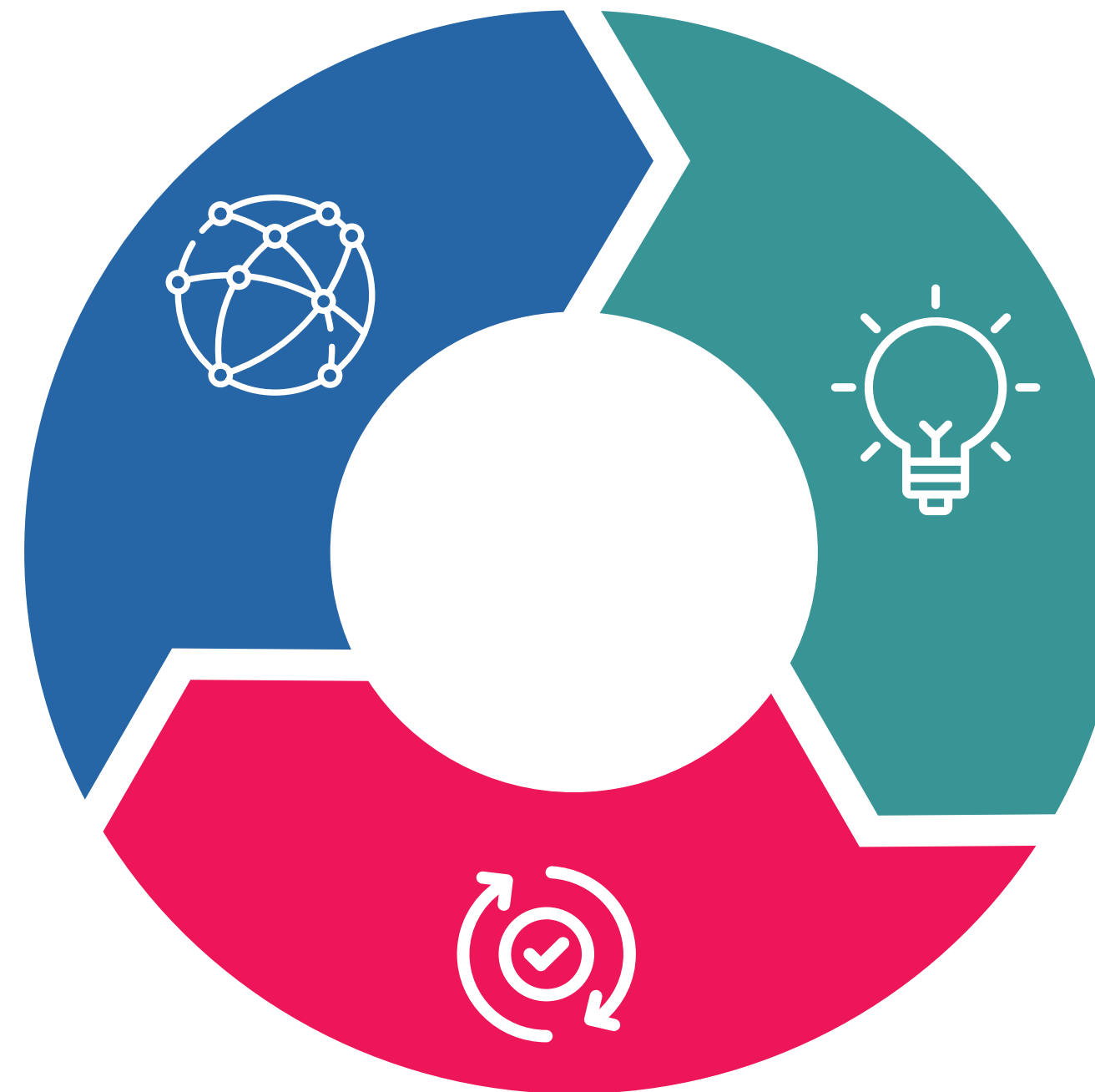
- **How can the intervention design be made more responsive and improve over time as the system and context shifts?**

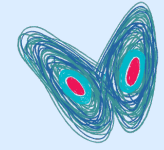
Associated approaches and techniques:
Agile for Grassroots

2 Understanding the solution, including understanding how it aims to change the system, what works in the process, and for whom, and where key areas for improvement lie.

- **What is the Theory of Change?**
- **How does it work?**
- **Which parts work and through what mechanisms?**
- **For whom does it work?**

Associated approaches and techniques:
Process Tracing





Why We Need a New Way to Learn

1 Definition

Change in social and economic development is complex and rarely linear. While traditional evaluation methods are valuable for assessing established interventions, they often fall short when solutions are still evolving or being scaled across diverse contexts.

2 Process

Adaptive Evaluation complements these approaches by supporting learning alongside action, helping teams understand how change happens, adapt in real time, and strengthen interventions as they grow.

3 Value Add

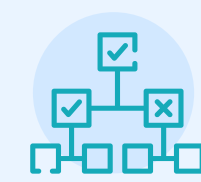
Adaptive Evaluation helps teams to:



Make sense of what's happening at the system, organization, and people levels.



Notice what's emerging, beyond preset indicators.



Examine and document what's working (or not), how, and for whom, while change is still unfolding.



Engage teams and partners in reflection and learning from experiments.



Inform decisions across the scaling journey and guide the use of the right tools.

The Five Core Principles of Adaptive Evaluation



1

Continuous journey

AE is an ongoing, iterative learning process.

2

Multiple tools

It draws from systems-based, theory-based, and iterative approaches, using both qualitative and quantitative methods.

3

Focus on mechanisms

AE examines not only what works, but how and why it works.

4

Participatory by design

It actively involves those closest to the intervention.

5

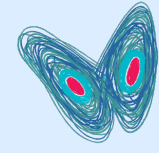
Learning over testing

AE embraces multiple emerging hypotheses within complex systems.



2 Process

What does Adaptive Evaluation look like?



The Adaptive Evaluation Learning Process

At Imago, the methodology takes shape through three connected stages. These stages repeat throughout scaling as teams refine strategy and improve delivery.

Definition 

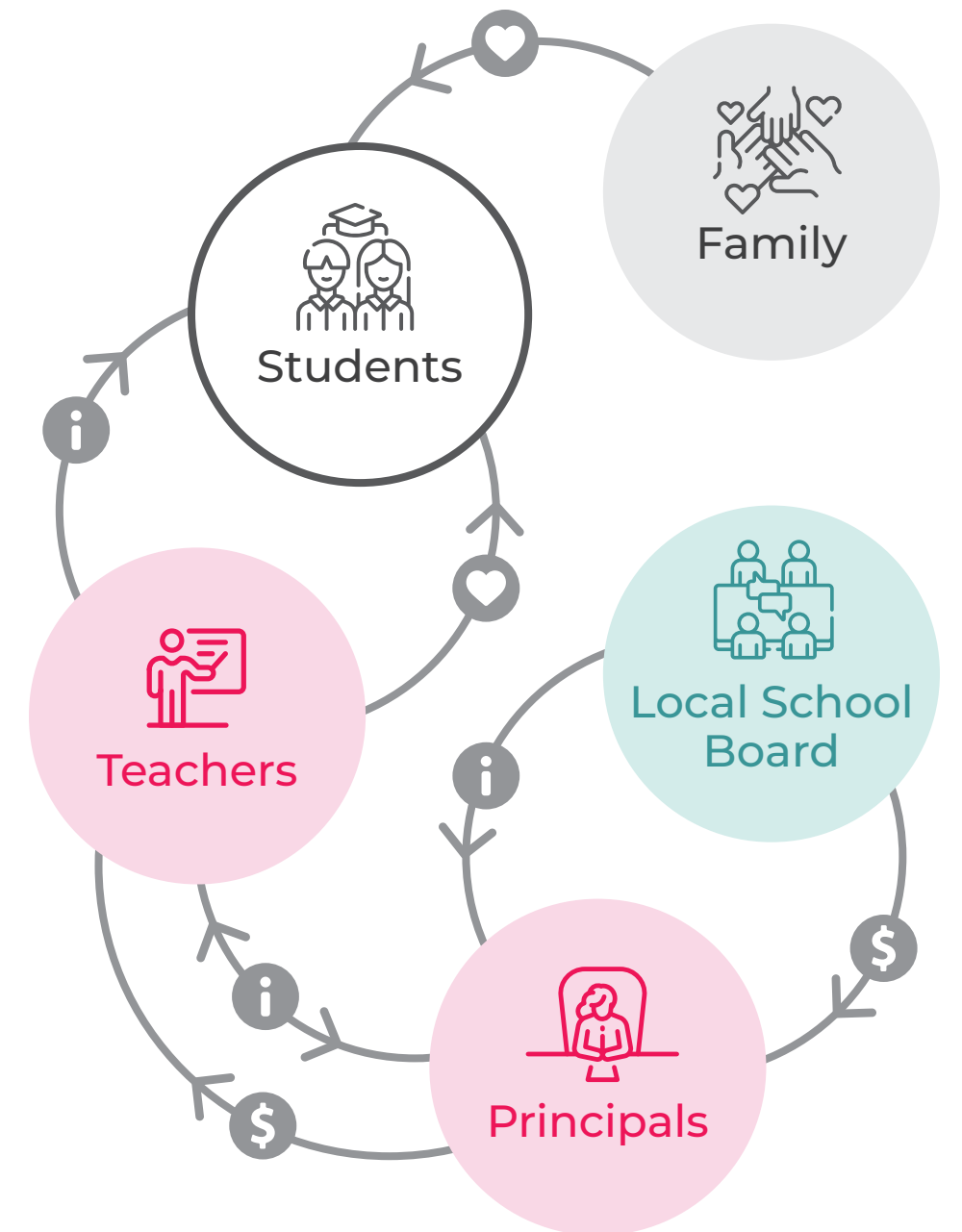
Process 

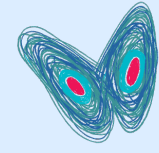
Value Add 



Tools such as **actor mapping** and **system dynamics mapping** help teams visualize how challenges persist and where interventions can have the strongest influence.

Here we share one example from our work that shows what Adaptive Evaluation looks like in practice.





Example 1

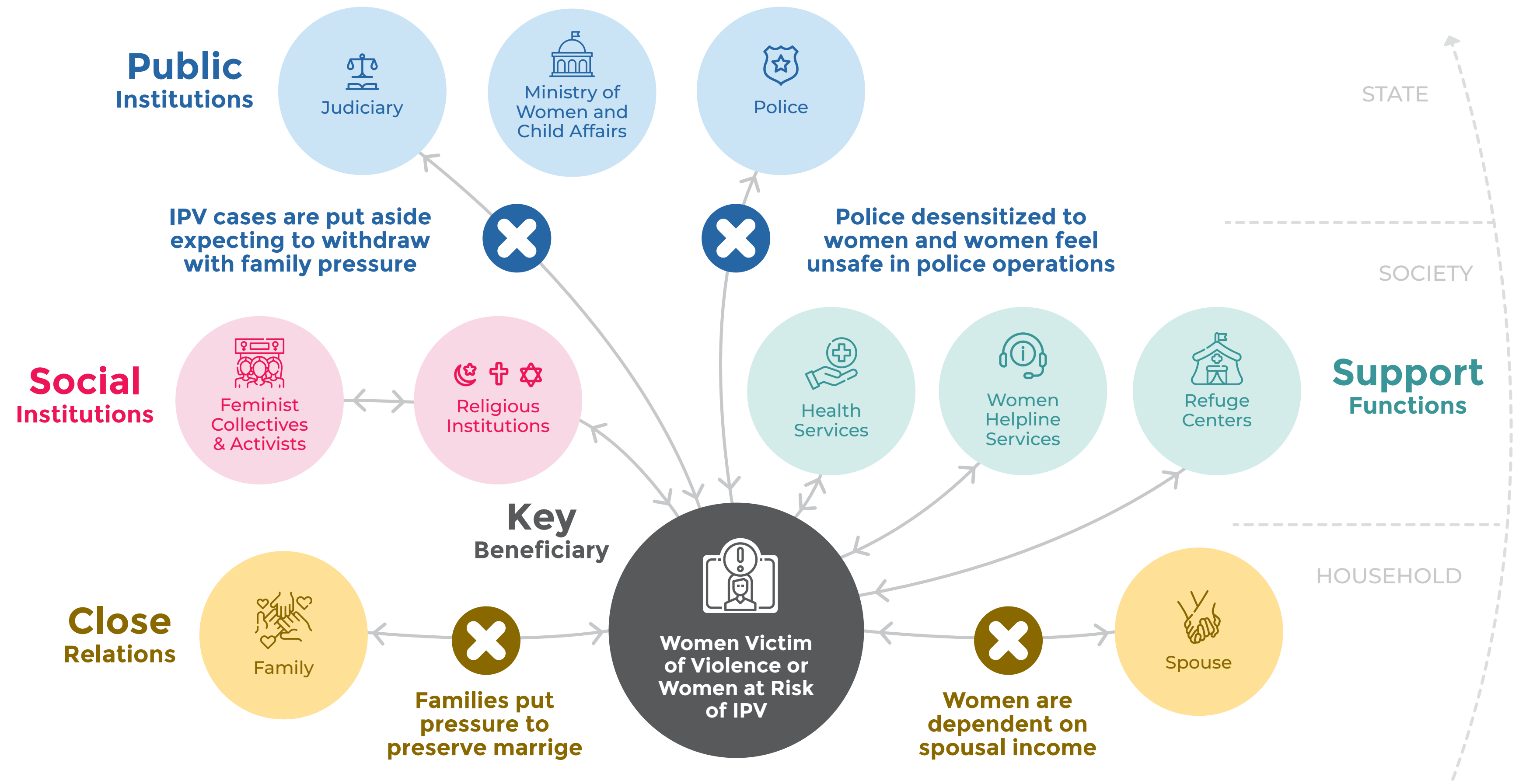
Actor Mapping

Multiple interventions across justice, health, social services, and women’s rights organizations exist to address intimate partner violence (IPV), but they operate largely in silos, without a shared understanding of the system.

Actors Mapping helped place women experiencing - or at risk of - IPV at the center. Mapping all actors who interact with these women provided a holistic view of the ecosystem and surfaced structural patterns that were previously invisible.

Actors Mapping revealed:

- Power dynamics and dependencies (e.g., economic dependence on the perpetrator).
- Social and family pressures that discourage reporting.
- Institutional gaps, such as desensitized police response and judicial delays.
- Critical moments where the system fails or revictimizes women.

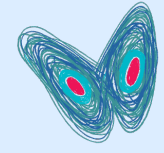


Additionally, Actors Mapping also helped show why isolated interventions were not enough to shift systemic drivers of IPV, identified key leverage points for system change - such as cross-

ministerial coordination - and created a shared, multisectoral understanding that became the foundation for redesigning a more integrated, user-centered national IPV strategy.

- Legend
- Key Beneficiary
 - Social Institutions
 - Close Relations
 - Public Institutions
 - Support Functions

This is an adaptation of Imago's work with a multilateral organization on intimate partner violence in Africa.



Example 2

System Dynamic Mapping

Despite numerous interventions in justice, health, security, and economic empowerment, the root causes of intimate partner violence in the country where our example took place continue to reinforce existing patterns. To understand why, Imago conducted a **Systems Dynamics Mapping** exercise. This tool made it possible to visualize the structural bottlenecks and behavioral patterns that prevent women from pursuing legal cases and accessing protection.

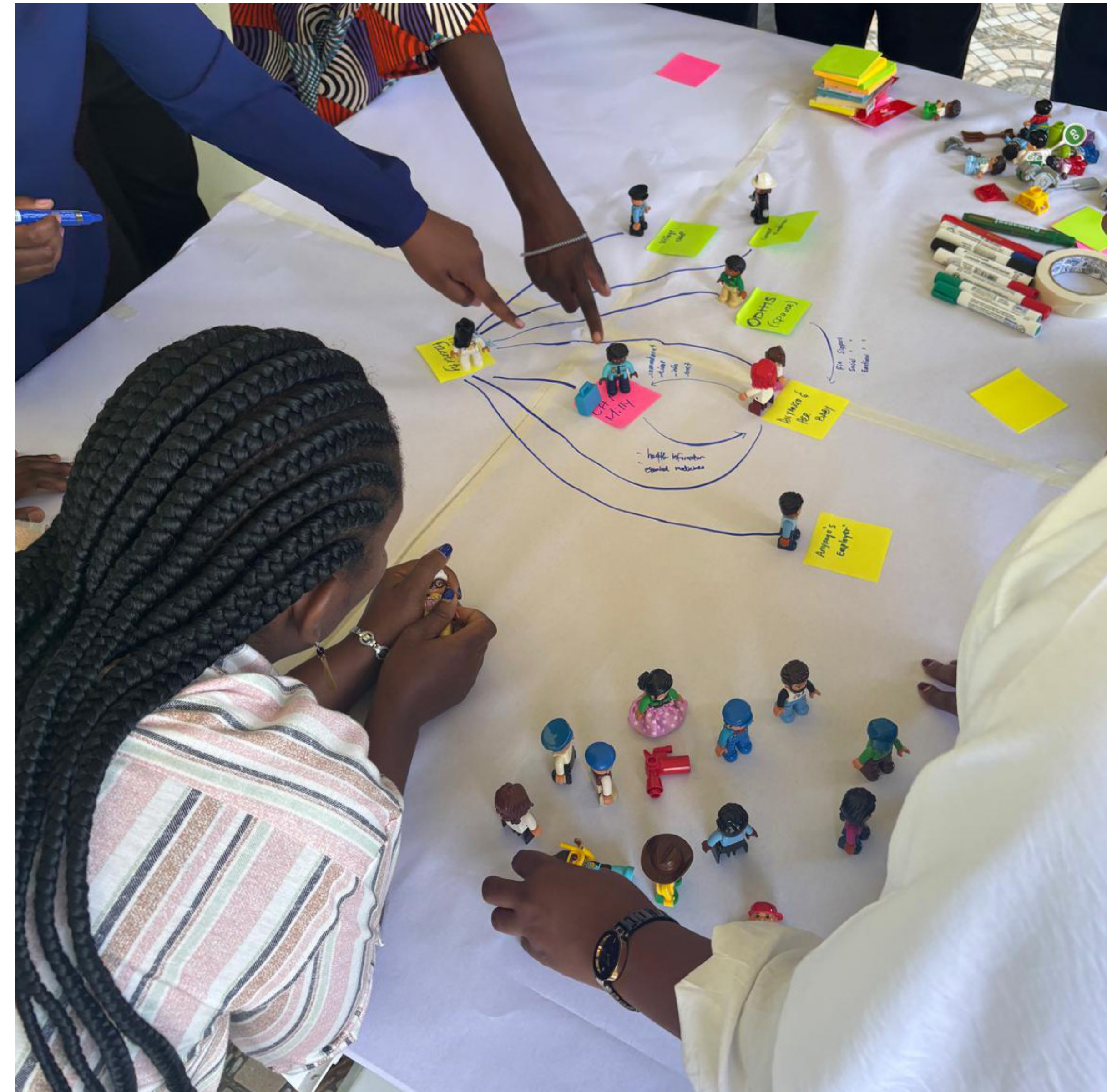
Systems Dynamics Mapping helped the team answer four essential questions:

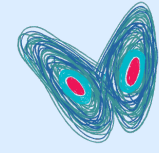
- Why do IPV root causes persist?
- What deeper dynamics drive the problem?
- How do existing interventions attempt to shift these dynamics?
- How do interventions interact when viewed as part of a larger system?

The Dynamics Mapping exercise was central to this example, helping explain why the system remains resistant to change despite many programs addressing IPV. It showcased the interacting forces that limit reporting and conviction, pointed to key areas for change, such as income generation and the legal system, and offered a broader view of how efforts work together, or fail to do so, to influence system behavior.

We explain the system dynamics using feedback loops, in which an adverse outcome (e.g. low likelihood of legal cases on IPV being pursued) influences various other variables (e.g. awareness of legal rights), eventually making the initial adverse outcome even worse.

Our analysis uncovered several feedback loops that explain the persistence of IPV.



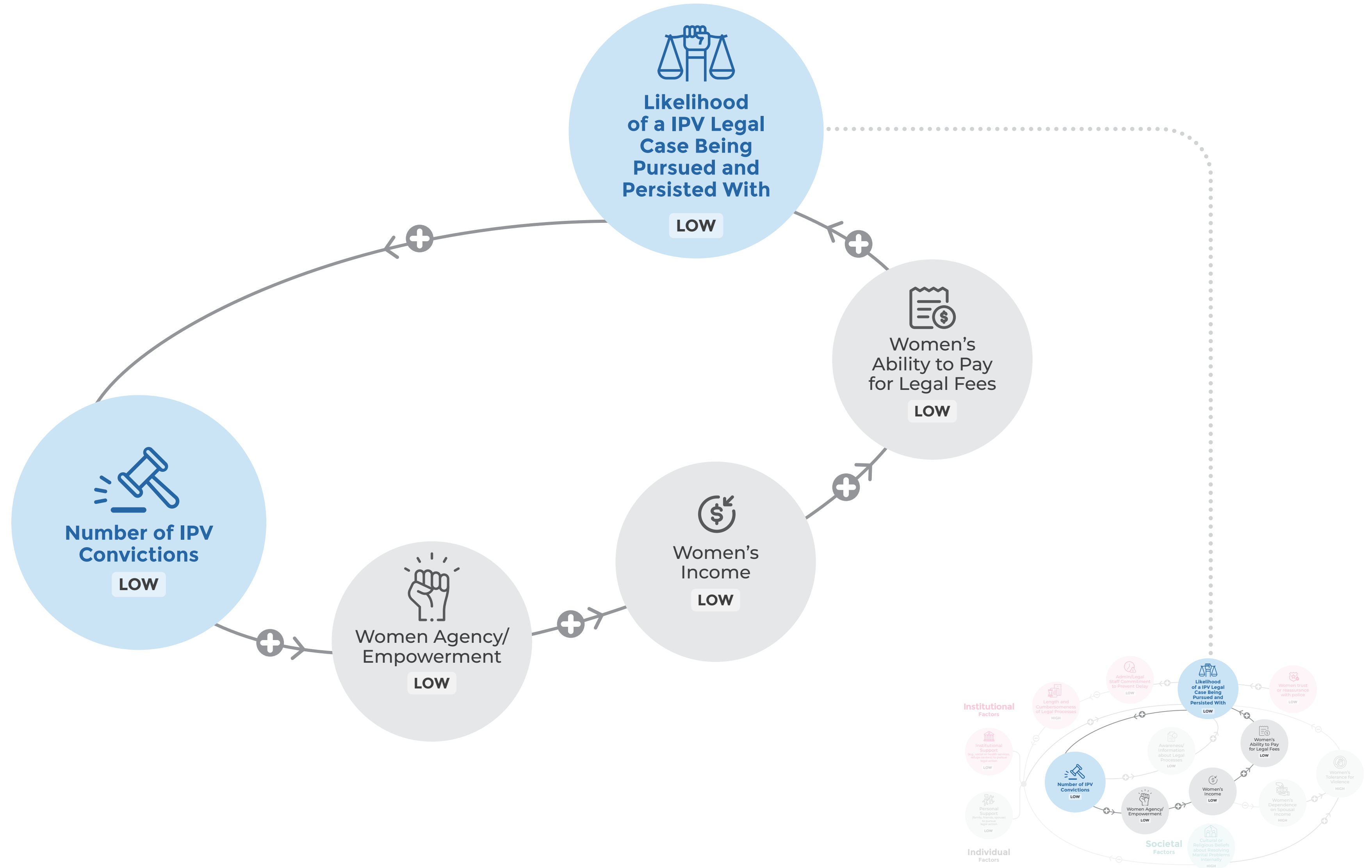


We highlight two here:

Income Loop

Implication:
Dependence on partners reinforces women's lack of agency.

Low income increases women's dependence on spouses, forcing many to endure violence for economic stability and discouraging legal action, which further erodes their agency and independence.



Legend



Primary Outcomes



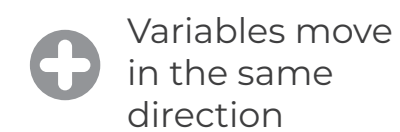
Institutional Factors



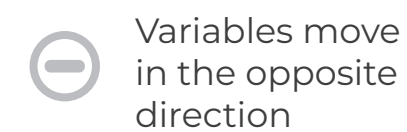
Societal Factors



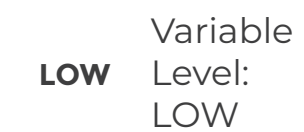
Individual Factors



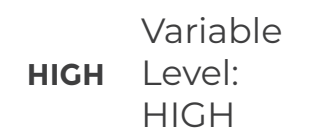
Variables move in the same direction



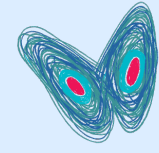
Variables move in the opposite direction



Variable Level: LOW



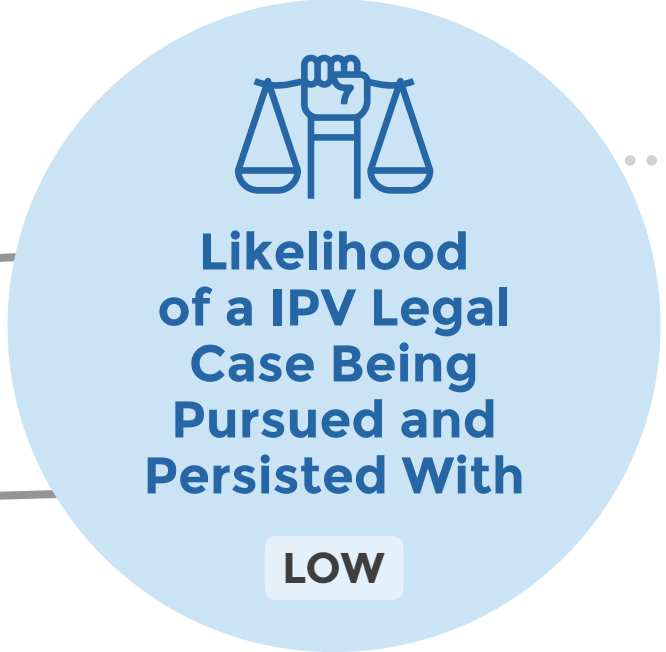
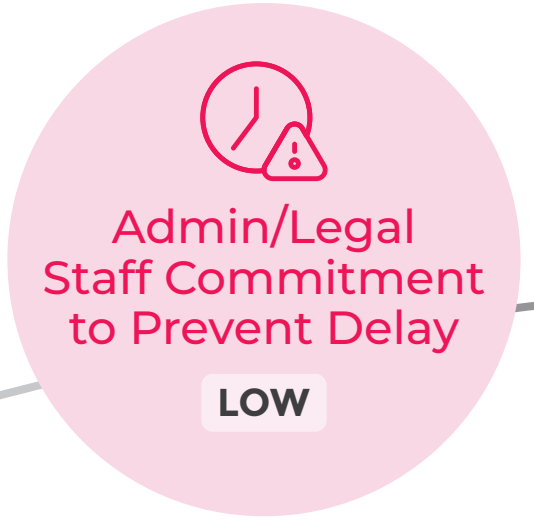
Variable Level: HIGH



Institutional Factors



Individual Factors



Legal Loop

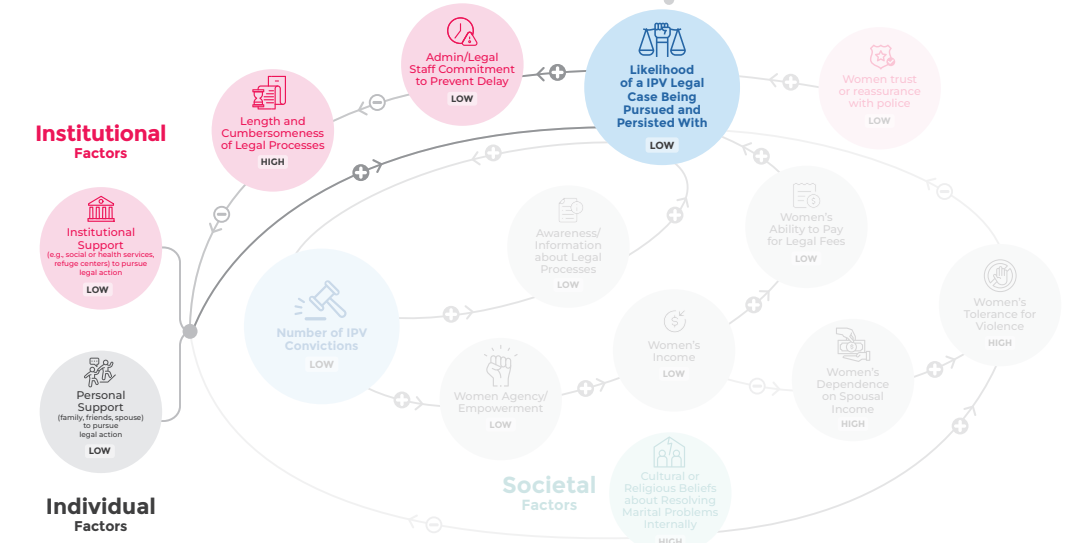
Implication:
Institutional behaviors influenced by patriarchal structures actively perpetuate justice gaps.

With cases rarely pursued, legal staff often expect withdrawals, and deprioritize them, slowing proceedings, and testing patience and support of families and institutions, which further discourage legal action.

Overlaying ongoing interventions onto the dynamics map **allow us to see where programs were effectively influencing system variables, and where they failed to break the reinforcing loops.** For example, income-generation programs help reverse both income loops by improving autonomy, agency, and women's capacity to pursue legal cases.

The Dynamics Mapping exercise was crucial because it:

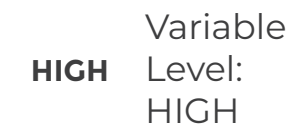
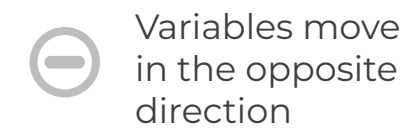
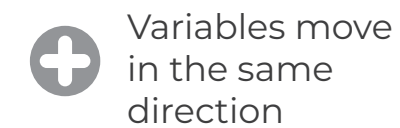
- **Explained why the system is resistant to change** despite many programs

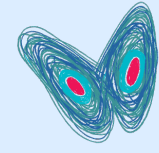


- **Exposed the interacting forces** - economic, institutional, and social - that suppress reporting and conviction rates
- **Clarified leverage points** such as income generation, legal system reform, and awareness-raising
- **Enabled a coordinated, portfolio-level perspective,** showing how interventions combine (or fail to combine) to shift system behavior.

You can learn more about this example in page 34 of our [Adaptive Evaluation Technical Toolkit](#).

Legend





1 Definition

2 Process

3 Value Add

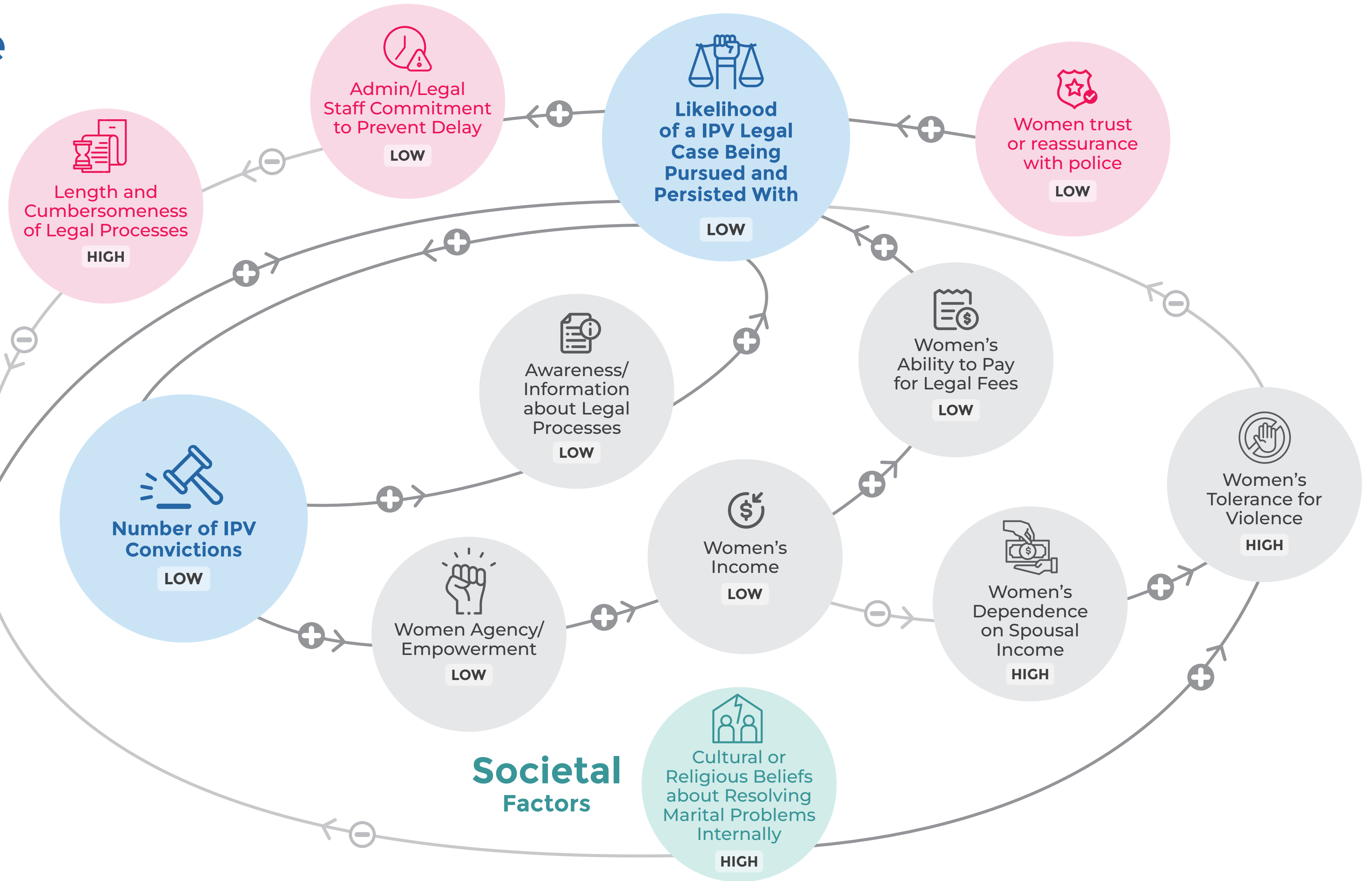
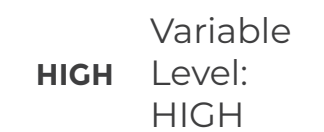
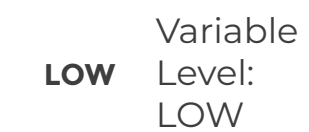
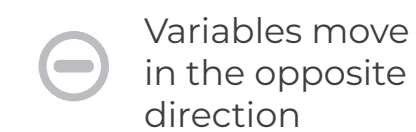
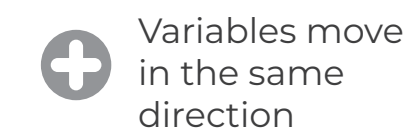
The Whole System

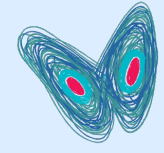
Institutional Factors



Individual Factors

Legend





The core question at this stage is: **how do our actions create progress toward change?**

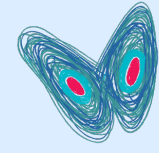
Here, teams clarify the pathways through which the intervention(s) are intended to work through the following questions:

- a. What steps must take place for impact to happen?
- b. Which actions matter the most?
- c. Where are assumptions holding or failing?

To answer these questions, we use theory-based approaches built around a **Theory of Change (ToC)**.

A ToC explains how a solution is expected to lead to better people outcomes, unpacking the “black box” or series of steps between a solution and its intended result.

Our core method is process tracing, which involves testing each step of the theory of change using qualitative and quantitative evidence as it emerges. This approach supports adaptive learning: as new evidence appears, assumptions can be confirmed, revised, or rejected, and the theory of change can be updated over time. **Process Tracing** also helps clarify which parts of a solution are essential before scaling.



Case

Adaptive Evaluation of SEWA's Women's Enterprise Support System (WESS)

Method

Theory of Change & Process Tracing

SEWA is a 2.9-million-member union of informal women workers in India. To strengthen women's livelihoods, it has supported the creation of over 150 Women's Collective Enterprises (WCEs), though many struggle with branding, marketing, human resources, compliance, and access to capital. To address these gaps,

SEWA created the Women's Enterprise Support System (WESS), an institutional body offering tailored business modules, and ongoing mentorship - similar to an accelerator or incubator.

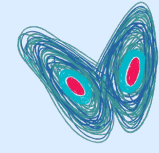
Imago's Adaptive Evaluation sought to understand whether WESS strengthens the business capacities of WCEs and how it contributes to financial sustainability, income, and women's agency.

The evaluation was highly complex: it coincided with COVID-19, covered eight business-function modules, involved eight WCEs across five sectors, and spanned five states

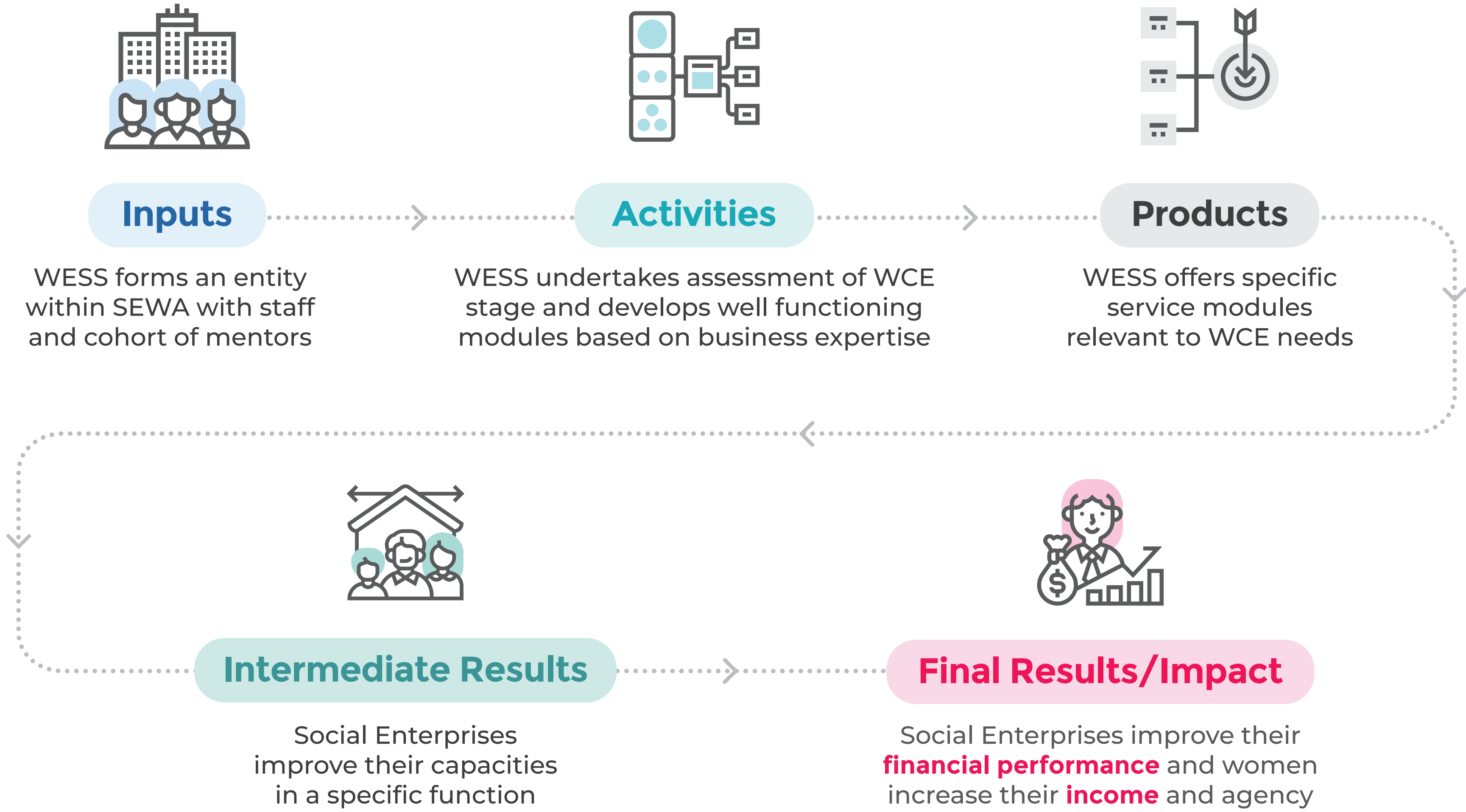
in India. In this context, AE proved particularly useful.

A key step in Imago's Adaptive Evaluation of WESS was developing a shared Theory of Change (ToC) that articulated how the intervention was expected to generate impact. The ToC clarified the causal logic linking WESS training and service delivery to improved business capacities, financial performance, and women's empowerment. This shared framework made explicit the assumptions underlying the model and provided a structured basis for inquiry.

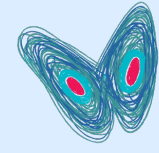
Process Tracing then enabled Imago to test this causal logic in practice. Instead of relying on before-and-after comparisons or experimental designs which were neither feasible nor appropriate in this complex, evolving context, Process Tracing allowed the team to "open the black box" of implementation. Imago examined each step of the causal pathway to assess whether and how WESS services contributed to intermediate changes within Women's Collective Enterprises, and the strength of evidence supporting each link in the chain.



High-Level Theory of Change



Source: [Scaling Up Development Impact](#), Guerrero, et al., 2023
[Applications of an Adaptive Evaluation approach to assess SEWA's Women's Enterprise Support System](#), Yadav et al, 2024
 Based on Imago's work with SEWA on a Gates Foundation Grant



High-Level Process Tracing results - WESS is a solid proof of concept



WESS forms as an entity within SEWA with staff and cohort of mentors



WESS undertakes assessment of WCE stage and develops well-functioning modules based on business expertise



WESS offers specific service modules relevant to WCE needs



Social Enterprises improve their capacities in a specific function



Social Enterprises improve their **financial performance** and women members increase their **income** and agency



Confident Working 😊

Confident Working 😊

Somewhat Confident 😐

Confident Working 😊

Somewhat Confident 😐

Evidence



- WESS has **full-time active staff** and a cohort of mentors
- WCEs **recognize WESS**
- It remained **resilient despite COVID**

- WESS **undertook needs assessments**
- Modules are at different stages, but most have **formal guides tailored to the WCEs** contexts

- Most **modules are offered on time with quality**
- Due to travel and lost wages, **full attendance is difficult**
- **Content is understood** but **needs frequent refreshers**

- **Module learnings were largely applied**
- In most cases, it **helped improve the specific function**

- 5 out of 8 WCEs were sustainable
- **No evidence of increase in women's income**
- Strong qual evidence that WCEs changed women's lives

Sources



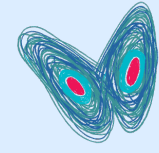
- A retrospective **case study of the WESS** during COVID
- **WESS Organization journey** and diagnosis
- **Interviews** for WESS and WCEs

- Review of **needs assessments quality**
- Review of **module guides and pedagogy**

- Detailed **Process Tracing of ToCs for each WESS module** as it applies to a WCE. This included evidence from interviews, attendance, and surveys on comprehension

- Detailed **Journeys of each WCE** in the study using interviews, financial data, and program data

- Financial analysis of WCEs
- Quant Survey (baseline midline, endline) of ~1000 women members
- Qual interviews of women journeys with WCEs



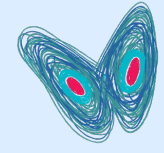
Using Theory of Change combined with Process Tracing, Imago and SEWA were able to:

- Identify and validate the causal mechanisms through which WESS generates change
- Assess which mechanisms were functioning as intended and where they were weak, incomplete, or breaking down
- Understand why certain service modules produced stronger results than others
- Validate, refine, or challenge key assumptions underlying the WESS model
- Pinpoint gaps, bottlenecks, and opportunities for refinement
- Transform the Theory of Change from a static planning tool into a living learning framework
- Generate actionable insights to refine the intervention design
- Inform strategic decisions for improvement and scale



What Process Tracing Revealed

- WESS successfully created a standardized, replicable set of business support modules.
- 5 out of 8 evaluated enterprises made meaningful progress toward financial sustainability.
- Women reported significant empowerment outcomes - confidence, leadership, decision-making power - even when income gains were not significant.
- The ToC was largely validated, but the evaluation illuminated where mechanisms were strong, weak, or needed adaptation.



3

Learning and iterating to improve the solution



This is where AE moves from diagnosis to action.

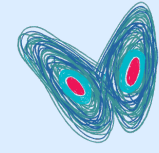
The core question at this stage is: **what should we adjust to strengthen impact?**

Learning is translated into concrete improvements through experimentation and iteration.

Drawing from an **agile for grassroots** methodology, Imago works with teams to:

- a. Identify priority challenges
- b. Design small tests or prototypes
- c. Gather evidence and feedback to define improvements
- d. Iterate and repeat the cycle

This process allows teams to adapt quickly while staying grounded in evidence, rather than assumptions.



Case

Adaptive Evaluation of SEWA's Women's Enterprise Support System (WESS)

Method

Agile for Grassroots

During the Adaptive Evaluation of SEWA's WESS, Process Tracing uncovered a critical issue: women's incomes did not show a significant increase on average, despite the intervention's intention to strengthen enterprises and livelihoods.

This pointed to a weak or incomplete causal pathway between WESS support and improved economic outcomes. One enterprise, Lok Swasthya Mandali (LSM), a health cooperative focused primarily on manufacturing medicines, where women ("Sakhis") also had the opportunity to earn commissions through medicine sales, became the focus for experimentation.

Although the commission model had strong potential, women were earning very little, and this channel was underutilized, signaling that the mechanism linking enterprise support to income was not functioning as intended.

This made LSM an ideal candidate for Agile for Grassroots, Imago's iterative methodology designed to test solutions, learn quickly, and strengthen causal pathways. Agile for Grassroots was used to address a central learning question:

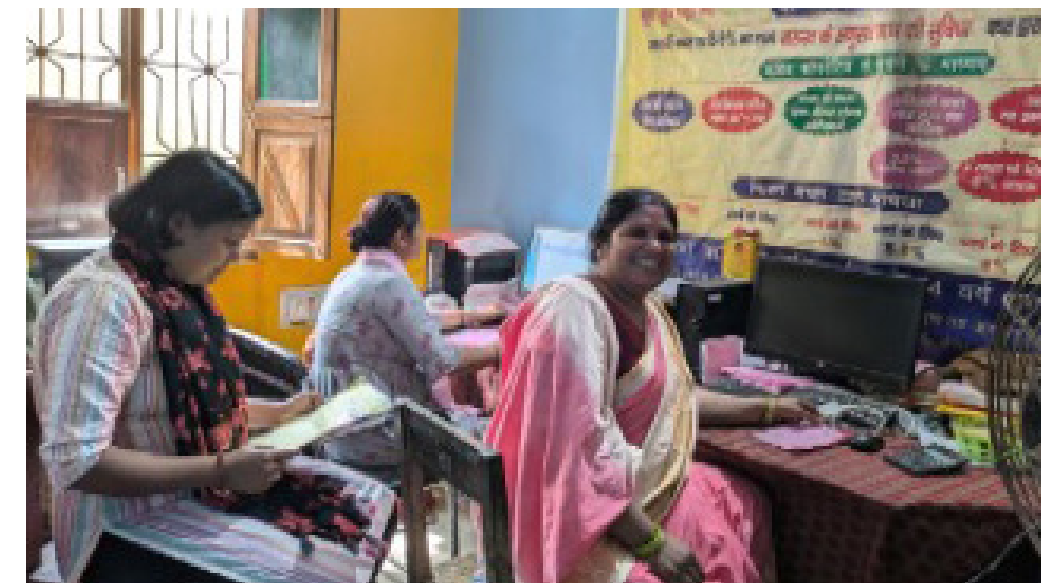
How can we strengthen the commission-based income channel for women in LSM?

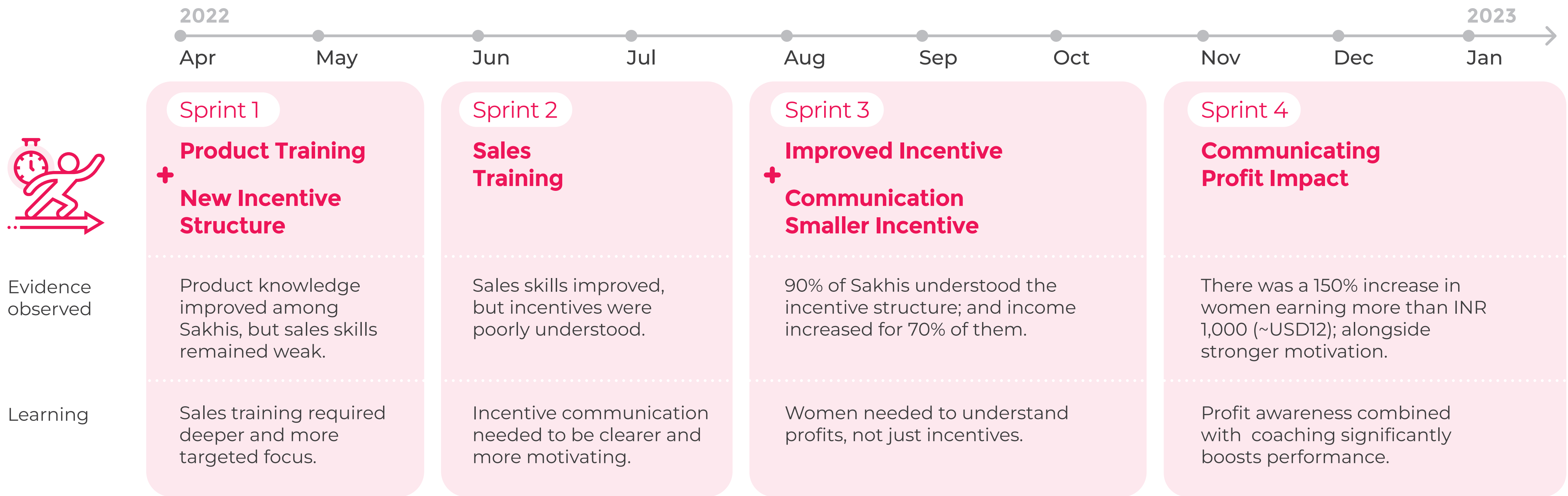
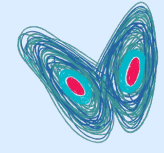
Through prototyping, the team was able to diagnose root causes, test practical solutions, generate evidence in real time, and adapt interventions until mechanisms began to work.

What the Prototyping Process Revealed

Working with LSM and the Sakhis, the team identified the core drivers of low income: weak product knowledge, unclear incentives, limited sales skills, and inconsistent communication.

This led to four focused learning sprints:





Across the four sprints, the intervention produced measurable improvements:



More women hitting sales targets



Higher average sales per Sakhi



Significant increases in earnings



Greater clarity, motivation, and adoption of good business practices

Most importantly, Agile for Grassroots made the Theory of Change work, showing the causal mechanism in action:

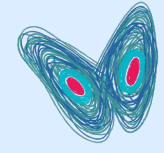
Training + incentive design + clear communication → higher income for women.



3

Value Add

What are the benefits of using Adaptive Evaluation?



What Adaptive Evaluation Achieves

Adaptive Evaluation helps organizations navigate complexity with clarity. It enables teams to understand what drives change within systems, adapt as contexts evolve, improve programs as they grow, and scale impact without losing what makes their work effective.

At its core, Adaptive Evaluation is a learning methodology. It supports organizations to learn and improve while programs unfold, integrating reflection and evidence into action across innovation, implementation, and scaling in complex environments.

Key Takeaways



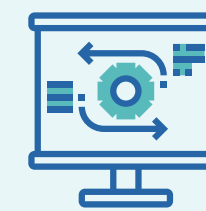
Adaptive Evaluation focuses on understanding how interventions drive change, using a variety of methods, qualitative and quantitative.



Participation is central: people closest to the work guide for learning and decisions.



Learning pathways of change strengthens effective and sustainable scaling.



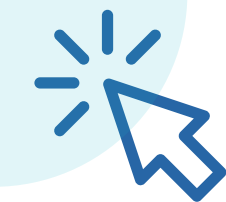
Learning and adaptation are continuous, not reserved for endline evaluations.

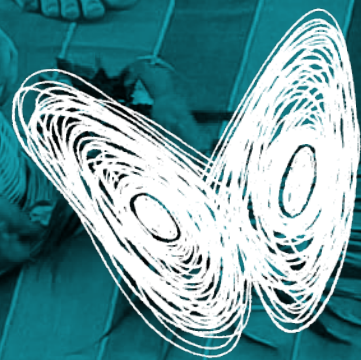


To get started, organizations can begin by asking reflection questions during implementation, mapping relationships and assumptions, testing small improvements, and learning through structured adaptation. For full guidance, tools, and facilitation resources, explore Imago's Adaptive Evaluation Technical Toolkit.

Want to learn more?

Access the complete **Adaptive Evaluation Technical Toolkit** directly [here](#).





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