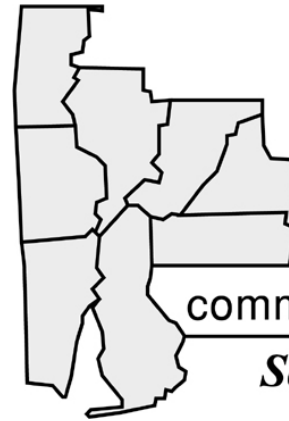GREATER NEW ORLEANS
FOUNDATION

For a vibrant region.
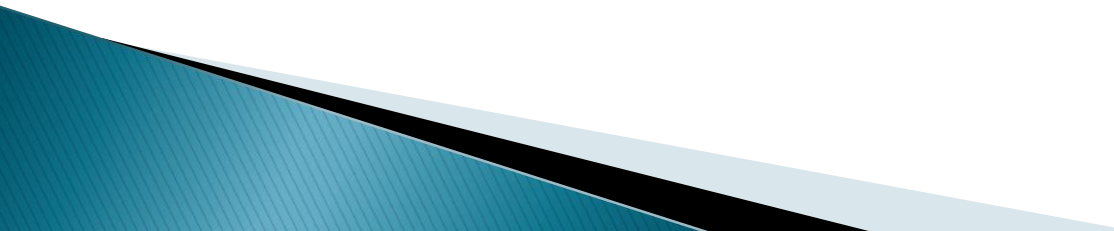
community foundation℠

South Alabama

Evaluation 101

Workshop Agenda

➢Introductions & Housekeeping

➢The Foundation of Evaluation (What and Why)

➢Basic Evaluation Terms

➢Evaluation Planning and Getting Started

➢Gathering and Using Evaluation Data

➢Wrap-up and Workshop Evaluation

Introductions

1 MINUTE with your partner:

Name

Organization

Role—Executive Director, Program Manager, etc.

What's the word or image that comes to mind when you think of "Evaluation"?

Share one success that you have had with your evaluation

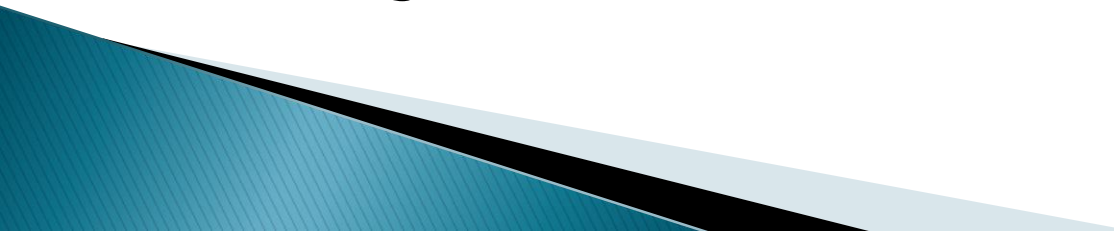## 4 MINUTES with your team:

Name

Organization

Role—same as above, etc.

Share your evaluation word/image and success story

Share one challenge that you are experiencing with your evaluation
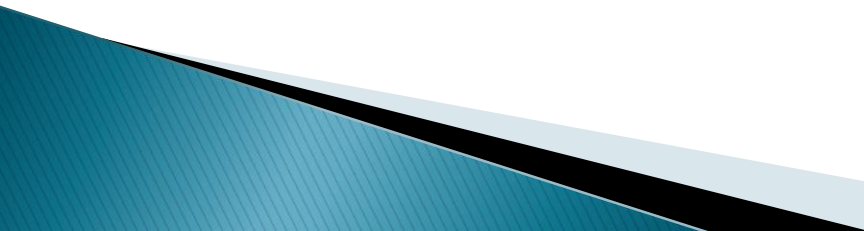
POPCORN RESPONSES

Working Agreements

- Recognize we are all at different levels, with varying experiences. Celebrate the diversity and the learning

- Cell phones on stun

- Vegas rule

- Questions, questions, questions…keep 'em coming

- Parking lot

Outcomes for Today

- Increase your understanding of basic evaluation terms, techniques and processes and why evaluation is important.

- Further your thinking on how to design and implement an evaluation approach that works for your organization.

- Learn the steps in evaluation planning and how to use evaluation data for organizational learning and improvement.

- Practice evaluation planning.

- Network with others and learn together.

What IS evaluation?
(choose one answer)

A. It is a survey to collect information from participants
B. It is an end-of-session questionnaire
C. It is a success story to document our value
D. It is statistics and data analysis (that I don't like to do!)
E. A systematic process of collecting information for a specific purpose and use.

Working Definition

Program evaluation is…"the systematic collection of information about the activities, characteristics, and results of programs to improve or further develop program effectiveness, inform decisions about future program development

in order to

learn and improve the work of your organization and tell your story of change

Adapted from Patton, M.Q. (2008) Utilization-focused evaluation (4th ed.)

Shift Your Thinking from:

Proving Success → **IMPROVING AND LEARNING ABOUT THE WORK**

The test that follows the work → **MEASURES PUT IN PLACE BEFOREHAND**

Evaluation is a complex Process that requires outside expertise → **STEP BY STEP PLAN & COMMITMENT TO UNDERSTANDING AND & LEARNING ABOUT THE WORK**
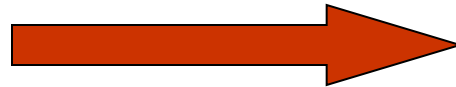
A new way of thinking…

‣FROM:
- What are you doing?
- What activities do you deliver?
- Who participates? How many?

‣TO:
- So what?
- What difference are you making?
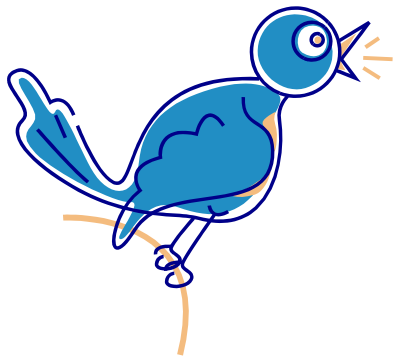- What results were achieved?
- Who benefited? How?

ACTIVITIES → OUTCOMES

Adapted from the University of Wisconsin-Cooperative Extension Program Development and Evaluation

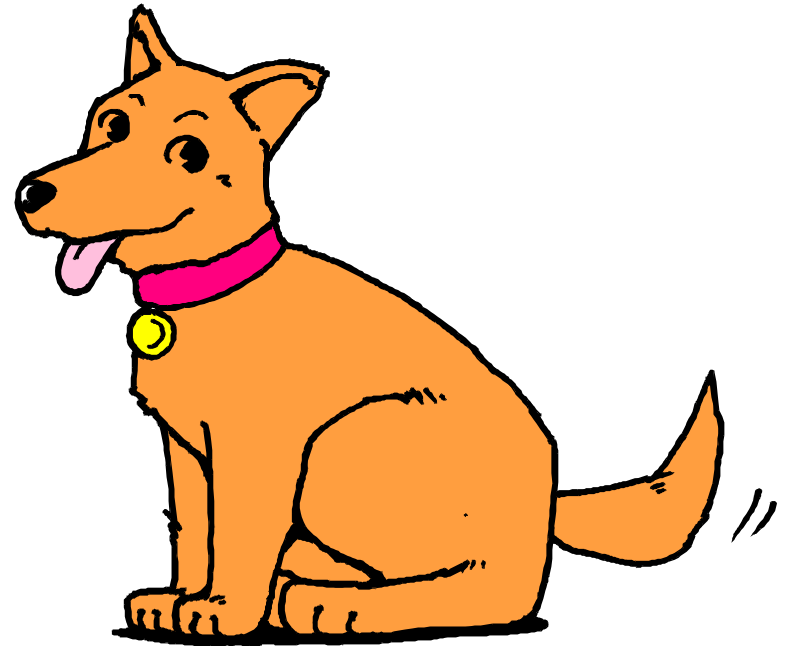| Outcomes (Results)	Outputs (Activities)
The change that occurs as a result of our activities and investments.	Show the quantity of work activity completed.

Not how many worms the bird feeds its young, but how well the fledgling flies.

United Way, 1999

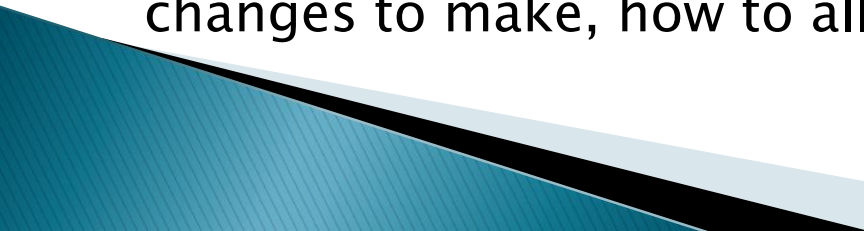# Why am I evaluating outcomes?

"Don't accept your dog's admiration as conclusive proof that you are wonderful."

–Ann Landers

Evaluation 101
Rules of the Road

- Is a process — one that starts at the beginning and not at the end

- Should be integrated into your planning and program work

- Answers important questions—about your program, that is important to your staff and board, and that gains you insights about your work

- Provides reliable answers

- Leads to better decision making—about what is working and how, what's not and why, next steps in your work and what changes to make, how to allocate money
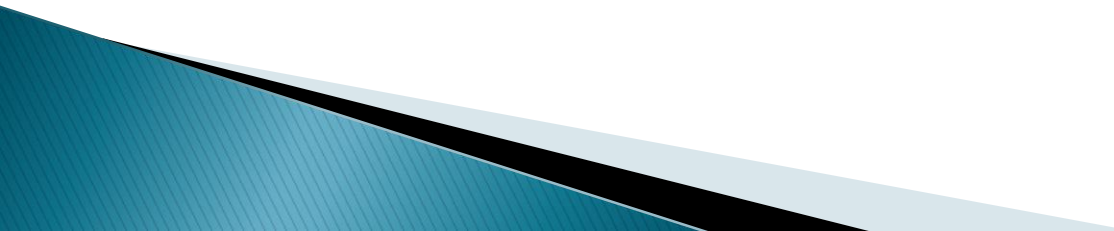
Why Evaluate?

- Understand, verify, or increase the impact, products, and/or services on customers and clients

- Help inform decision making and taking action

- Helps you *Be Accountable*

- Supports Fundraising Efforts

WHICH LEADS TO
Telling your story and becoming a learning organization

Foundations of Evaluation

‣ Community Needs

‣ Organization Mission and Goals

‣ Programs (services, initiatives, and activities as a pathway to achieving your mission)

‣ An Evaluation Approach and Plan

Foundations of Evaluation

‣ Community Needs
What are the conditions and situations we are trying to change? What needs are we addressing and why?

‣ Organization mission and goals
What are we trying to do? What will we do?

‣ Programs (services, initiatives, activities, etc) as a pathway to achieving your mission and internal operations
How did we do it? How well did we do it?

‣ Evaluation Approach and Plan
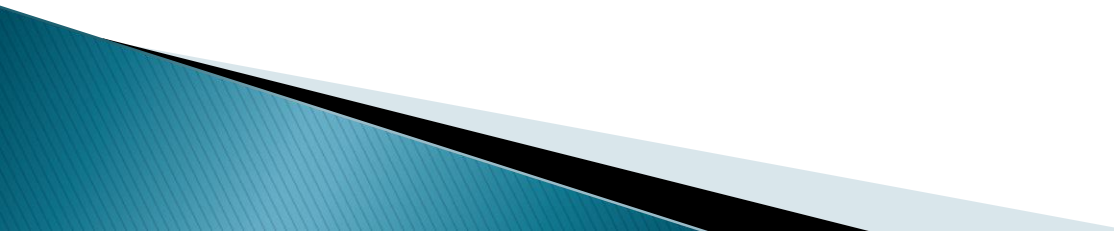*What difference did our work make? How do you know?*

Evaluation Readiness

–Clearly Defined Evaluation Priorities, Questions and Process (Evaluation Plan)

–Capacity and Resources to Conduct the Evaluation

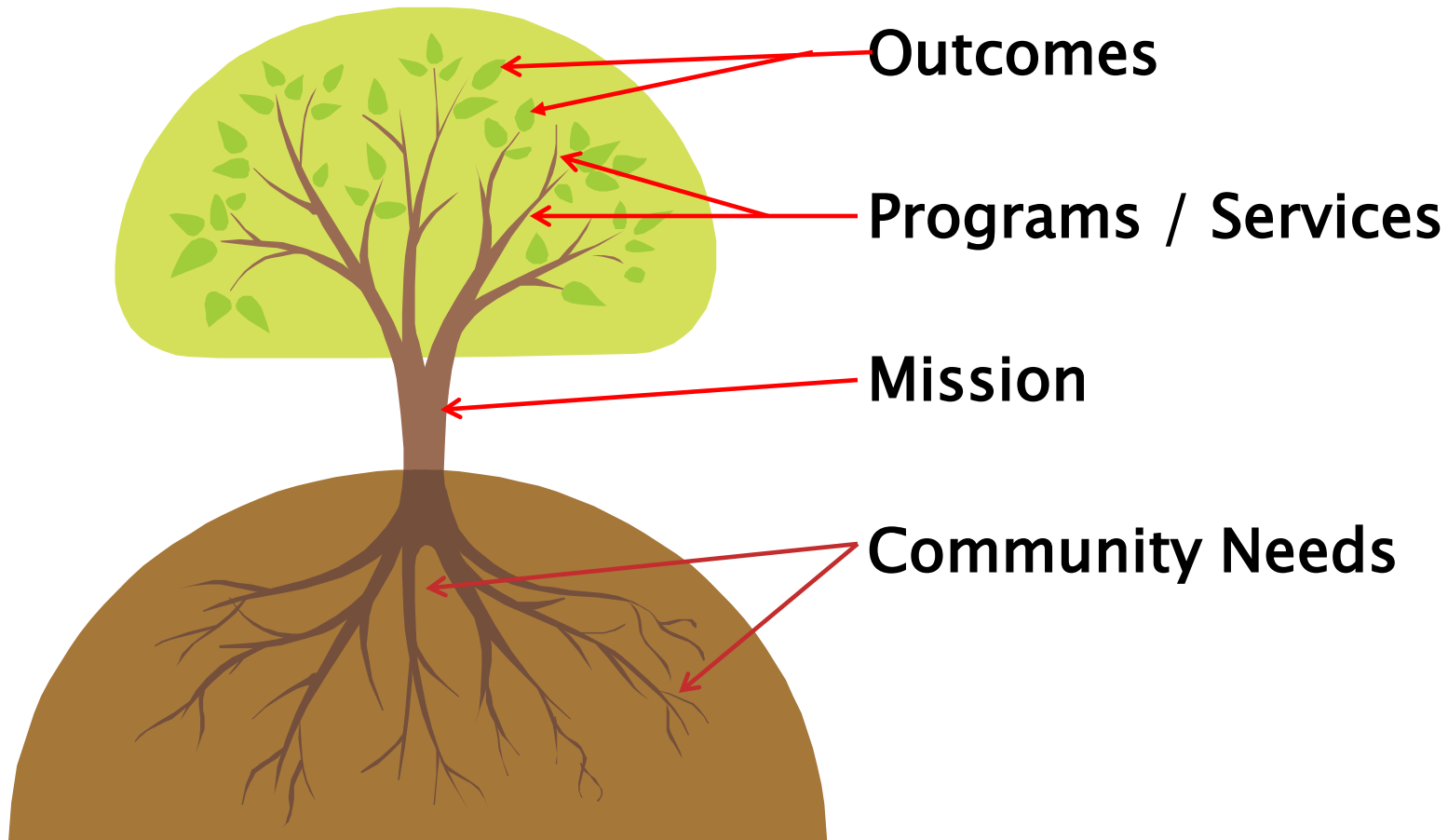–Organizational Commitment to Evaluation

Assess your organization's resource readiness
For evaluation: *Resource Readiness Checklist*
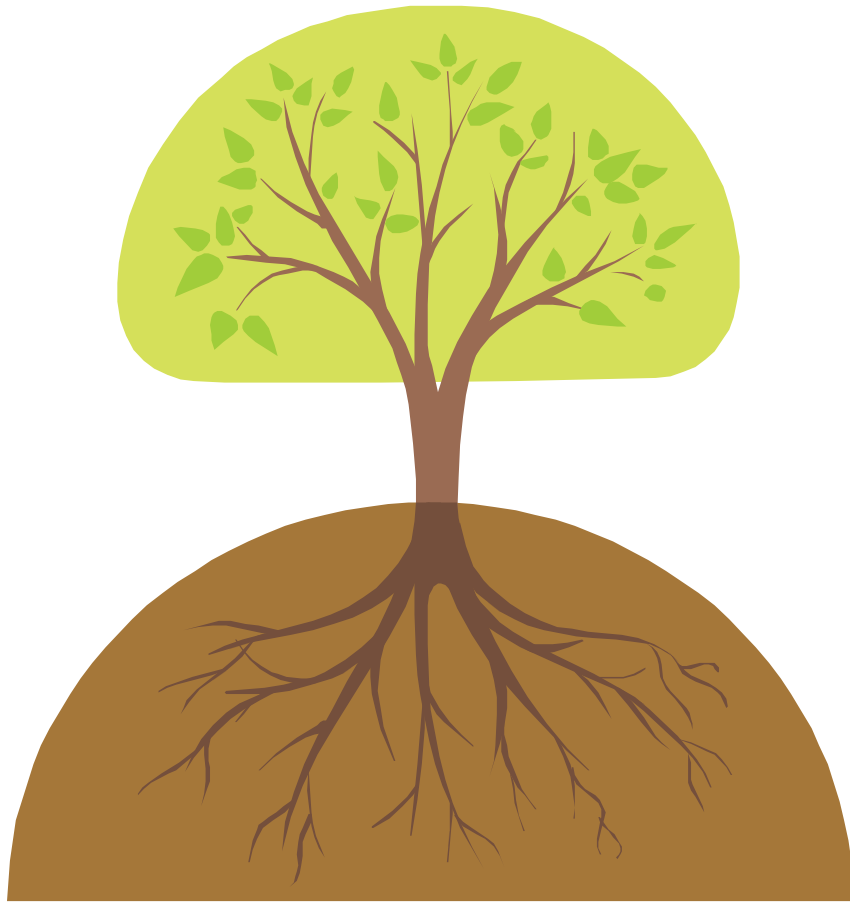
Barriers to Evaluation

–Lack of leadership commitment

–Limited time and resources for evaluation

–Limited knowledge and skills

–Attitude that programs cannot be measured

–Fear that evaluation data will hurt programs

–Lack of use or misuse of evaluation data

Foundations of Evaluation

Outcomes

Programs / Services

Mission

Community Needs

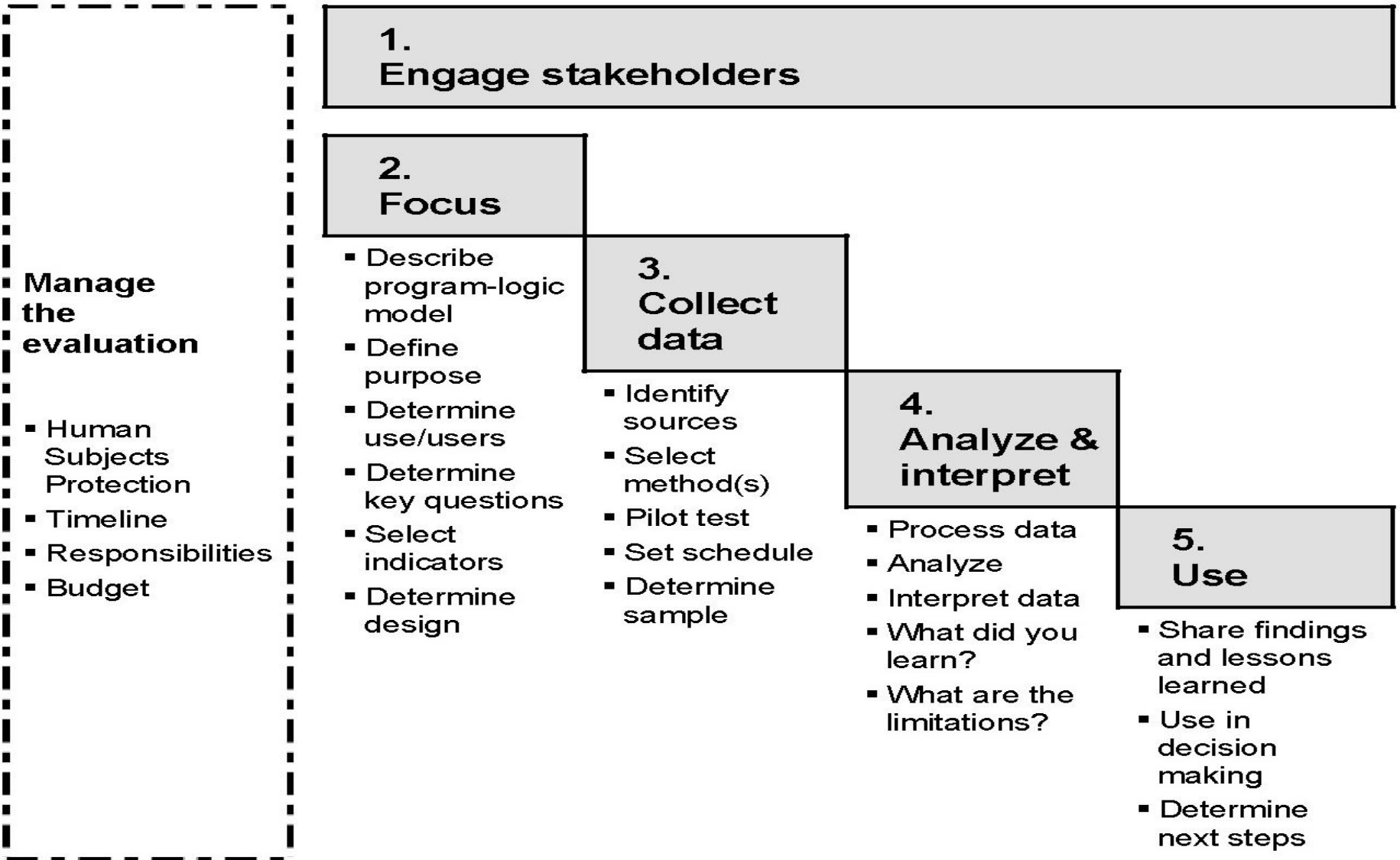# Reflect on Your Program/Service Start with the Roots

- What difference do you want to make?

- How are you meeting that need?

- What need are you trying to meet?

Reflect on Your Program/Service

- What indicators* will tell you that your program is on track?

*Indicators are specific, observable characteristics that can be assessed or measured to show results of your activities.

Steps in Program Evaluation

Manage the evaluation

- Human Subjects Protection
- Timeline
- Responsibilities
- Budget

1. Engage stakeholders

2. Focus

- Describe program-logic model
- Define purpose
- Determine use/users
- Determine key questions
- Select indicators
- Determine design

3. Collect data

- Identify sources
- Select method(s)
- Pilot test
- Set schedule
- Determine sample

4. Analyze & interpret

- Process data
- Analyze
- Interpret data
- What did you learn?
- What are the limitations?

5. Use

- Share findings and lessons learned
- Use in decision making
- Determine next steps

Standards of evaluation:
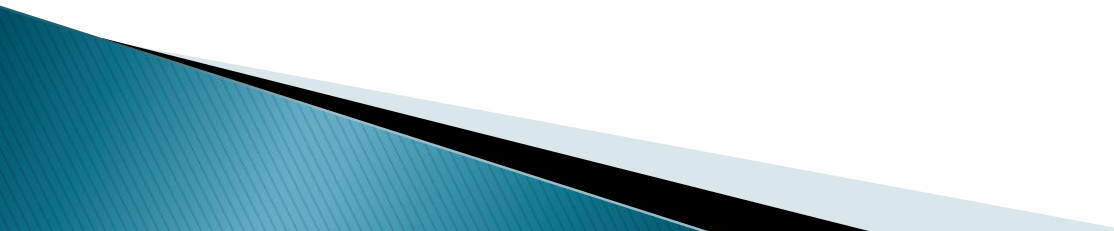- **Utility**
- **Feasibility**
- **Propriety**
- **Accuracy**

Evaluation Process

- Integrate Evaluation into your Work
- Assemble a Team and Engage Stakeholders
- Plan to Plan
  - Identify your evaluation question/focus
  - Determine your evaluation approach
  - Develop a written plan
- Create Tools for Data Collection
- Collect Data
- Analyze and Understand your Data
- Use the Data

Evaluation Approach

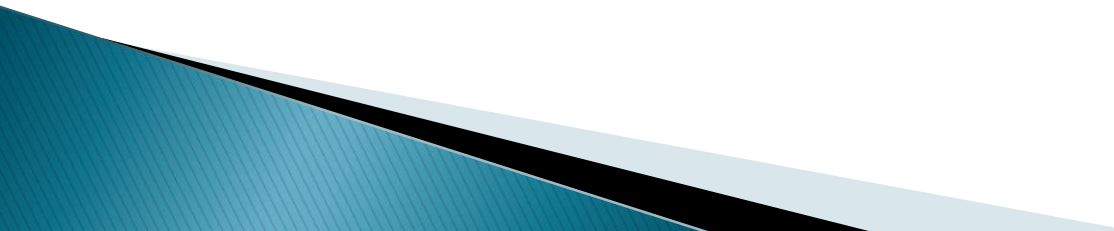## Process Evaluation (Formative) = Implementation

Did we do **what** we said we would do?

- Is the program functioning as it was designed to?
- What is working well, what needs improvement?
- Where are the gaps between program design and delivery?

Evaluation Approach

Outcome (Summative) = Results

What **resulted** because of this effort?

- What is the difference made by this program? What is the impact?
- What changes in attitudes, beliefs, skills, actions occurred among the target audience?

"When the cook tastes the soup, that's formative; when the guests taste the soup, that's summative."

Robert Stakes

Types of Data

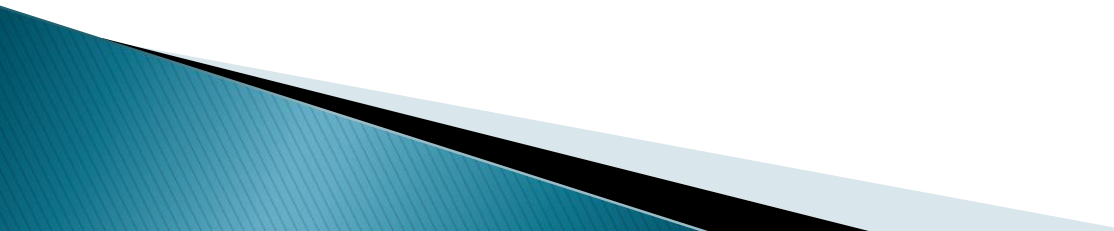| Qualitative	Quantitative

Qualitative

- Describes how program is operating, how participants feel, what opinions they have, etc.

- Direct contact with people involved in program

- Interviews, focus groups, surveys, observation

Quantitative

- Counts, Measures, Compares and Tracks (numbers of participants, % of people in a certain condition).

- Establishes numerical baselines (pre/post, etc)

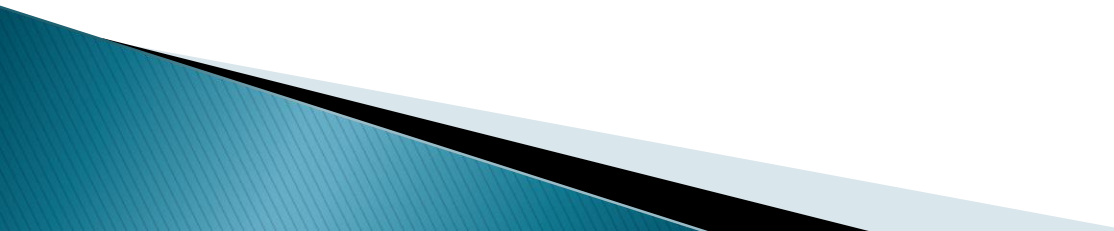- Surveys, attendance logs, registrations, document review, tests

Gathering Data
Keep in Mind....

- The questions you want answered
- Skills and capacity needed
- Availability of resources
- Suitability of data gathering tools
- Use/build on data you already have
- Opportunities and barriers to creating an Iterative process

Evaluation Tools

Common tools for collecting data:

- surveys and questionnaires
- observation
- interviews
- keeping records and notes

Reflect on Your Program/Service

- What are the ways or tools that you can use to collect data on your indicators?

*Indicators are specific, observable characteristics that can be assessed or measured to show results of your activities.
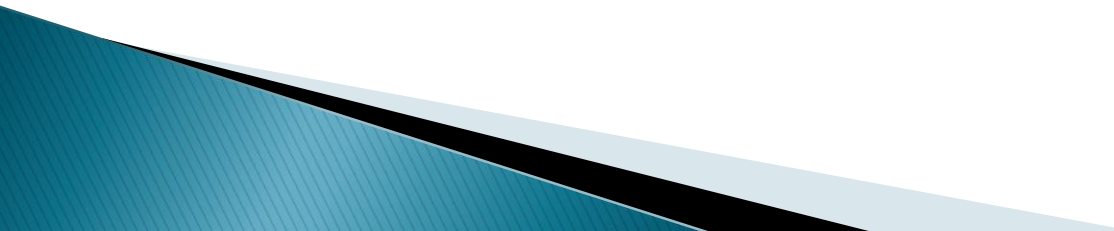
Analyzing and Understanding Data

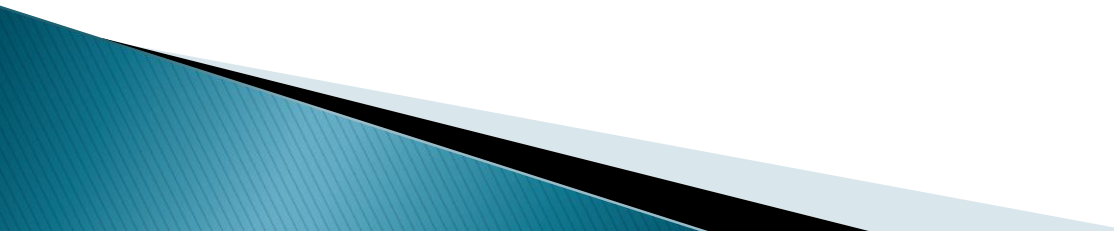Making sense and finding meaning in the data you've collected in light of what you want to know.
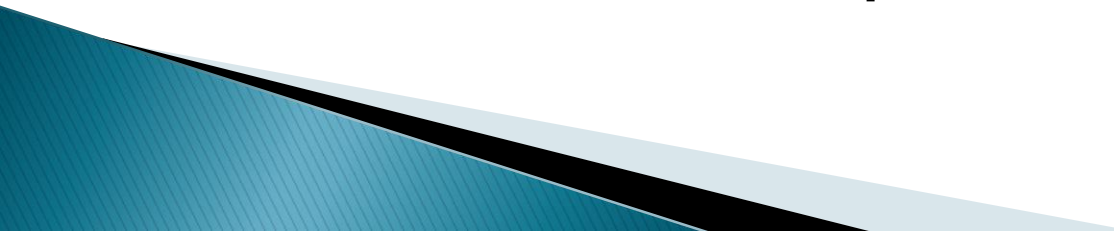
Analyzing and Understanding Data Keep in Mind….

- Organize the data as you collect it
- Describe and interpret the data (patterns, themes, surprises, unexpected)
- Might need outside technical assistance
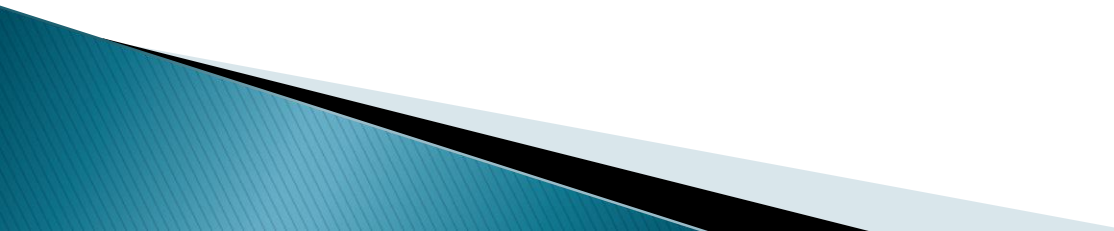- Reflect: What conclusions can we draw? Recommendations?

Telling the Story and Using What you Learned

- Know your audience AHEAD OF TIME
- Connect evaluation to decision making, improvement and learning
- Make report user friendly and customize to specific audience (summary reports)
- Share with your Board, your Staff, Your Funders, Your Partners, Your Community
- Share the Good, the Bad, the Unexpected
- USE IT or DON'T DO IT!!!

Things to Remember

- There is no one right way to do evaluation, it's based on what you want to know and learn and what is important to you
- Evaluation starts at the beginning—of the program, your planning, your practice, your thinking
- Involve staff from beginning
- Make use of what you already have—resources, relationships, information you have already collected
- Do it for you first, funders secondly
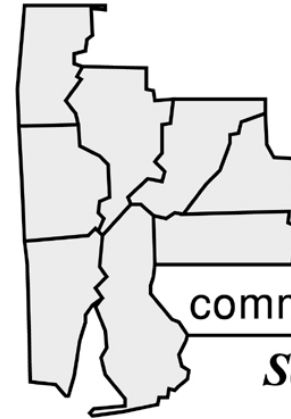- **Use it to learn and improve**

5 Key Evaluation Questions

What?   Did we do what we said we would do?

Why?   What did we learn about what worked and what didn't work

So what?   What difference did it make that we did this work?

Now what?   What could we do differently?

Presented by The Greater New Orleans Foundation
Joann Ricci joann@gnof.org and
Kellie Chavez Greene kellie@gnof.org
www.gnof.org