Evaluation, Metrics, Data - Starting Now

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Background
How we will spend our time together today...

- Evaluation café
- What is evaluation?
- Interactive evaluation session
What does evaluation mean to you?
What do we mean when we say an individual, organization, or group/coalition has evaluation capacity?

Capacity to conduct evaluation means:
- having people to coordinate the evaluation
- having knowledge about the purpose and practice of evaluation,
- having resources to hire an outside evaluator (if necessary), and
- willingness to be evaluated via records, instruments, and events.
What is evaluation and how do I get started?
What is evaluation?

Evaluation is a systematic and intentional process of gathering and analyzing data (quantitative and qualitative), to inform learning, decision-making and action.

Source: https://www.fsg.org/blog/what-evaluation-really
What are the different types of evaluation?

Different Types of Inquiry Address Different Kinds of Information Needs

- **Research**: Seeks answers to questions in order to generate new knowledge and/or understanding.
- **Developmental Evaluation**: Supports innovation by bringing data to inform and guide ongoing decision-making as part of the development process.
- **Monitoring & Performance Measurement**: Tracks adherence to accountability requirements; Assess a program or initiative by quantitatively measuring key indicators of progress.
- **Process Evaluation (Formative)**: Explores how a program or initiative is making progress towards its goals in terms of outputs and short-term outcomes.
- **Impact Evaluation (Summative)**: Determines the long-term effects of a program or initiative.

Source: https://www.fsg.org/blog/what-evaluation-really
What are the steps in the evaluation process?

- Identifying assumptions about why you think your strategy, initiative or program will work.
- Determining what change you expect to see during and after you implement what you set out to do.
- Engaging stakeholders that will use and/or be impacted by the results of the evaluation.
- Collecting and analyzing data to understand what happened.
- Communicating, interpreting and reflecting on the results.
- Making informed decisions to improve what you plan to do next.

Source: https://www.fsg.org/blog/what-evaluation-really
What are the methods used to collect data for evaluation?

- **Qualitative**
  - Open Ended Surveys/Questionnaires
  - Personal Interviews
  - Focus Groups
  - Photovoice
  - Observations
  - Case Studies

- **Quantitative**
  - Surveys/Questionnaires
  - Personal Interviews
  - Observations
What about equity in evaluation?

Equitable Evaluation Principles

1. Evaluation and evaluative work should be in service of equity.
   - Production, consumption, and management of evaluation and evaluative work should hold at its core a responsibility to advance progress towards equity.

2. Evaluative work can and should answer critical questions about the:
   - Ways in which historical and structural decisions have contributed to the condition to be addressed
   - Effect of a strategy on different populations
   - Effect of a strategy on the underlying systemic drivers of inequity
   - Ways in which cultural context is tangled up in both the structural conditions and the change initiative itself

3. Evaluative work should be designed and implemented commensurate with the values underlying equity work:
   - Multi-culturally valid
   - Oriented towards participant ownership.
Logic Models

LAYING THE FOUNDATION FOR EVALUATION
What is your initiative’s theory about how your work will lead to change?

- A program or initiative's theory represents the key factors that you believe will lead to change.

- There are many synonyms for program theory:
  - Logic model
  - Program logic
  - Causal model
  - Results chain
  - Intervention logic
  - Theory of change (TOC)
Tell me about your program.

- What is your program? What does your program do?
- Who participates in your program? Who is served?
- What do they gain? How do they benefit?
- How do you know/how would you know that your program is a “success”? 
How to focus your evaluation?

- Logic models are used to plan and integrate program implementation and evaluation.

- To focus the evaluation begin with a logic model.

- Start by thinking about the outcome you want and the key intervention you believe will cause the outcome.

- Review best practices and complete your logic model.
What is a logic model?

- A logic model is a visual representation of the program theory.

Activities → Inputs → Outputs → Outcomes → Impact(s)
<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
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<tbody>
<tr>
<td>Assumptions</td>
<td>The beliefs we have about the program, the participants, and the way we expect the program to operate; the principles that guide our work. Faulty assumptions may be the reason we don’t achieve the expected outcomes.</td>
</tr>
<tr>
<td>Activities</td>
<td>The planned activities intended from the investment of resources. Goods and services delivered.</td>
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<tr>
<td>Environment (external factors)</td>
<td>The surrounding environment in which the program exists and which influences the implementation and success of the initiative including, politics, climate, socio-economic factors, market forces, etc.</td>
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<td>Indicator</td>
<td>Expression of what is/will be measured or described; evidence that signals achievement. Answers the question “How will I know it”?</td>
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<tr>
<td>Inputs</td>
<td>Resources that go into a program including staff time, materials, money, equipment, facilities, volunteer time.</td>
</tr>
<tr>
<td>Outputs</td>
<td>The tangible activities, products, and participation generated through the investment of resources. Goods and services delivered.</td>
</tr>
<tr>
<td>Outcomes</td>
<td>Results or changes from the program such as changes in knowledge, awareness, skills, attitudes, opinions, aspirations, motivation, behavior, practice decision-making, policies, social action, condition, or status. Outcomes can be intended and/or unintended; positive and negative. Outcomes fall along a continuum from immediate (initial; short-term) to intermediate (medium-term) to final outcomes (long-term), sometimes used synonymously with impact.</td>
</tr>
<tr>
<td>Impact</td>
<td>The social, economic, civic, and/or environmental consequences of the program. Impact ends to be longer-term and so may be equated with goals. Impacts may be positive, negative, and/or neutral: intended or unintended.</td>
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Build your own logic model
Evaluating social change is complicated.

<table>
<thead>
<tr>
<th>Proposition for Evaluating Complexity</th>
<th>What It Means in Practice</th>
<th>Helpful Tools/Methods</th>
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| Seek to understand and describe the whole system, including components and connections | It is important for the evaluators to know how and why different components interact. This is to be treated as a “dynamic” and ongoing activity, rather than one-off. | • Systems Mapping  
• Social Network Analysis  
• Interviews |
| Pay particular attention to context and be responsive to changes as they occur | Context must be explicitly studied as part of the evaluation. Evaluation should also measure ways in which the initiative is affecting the context. Evaluation findings should be interpreted and grounded in context. | • Timeline of key events  
• Reviewing information related to context, including print and social media, demographic information, and other publicly available data  
• Interviews |
| Look for effective principles of practice in action, rather than assessing adherence to a predetermined set of activities | Evaluation should identify and explicate how effective principles of practice are alive in the work. Data and insights about how, where, and with whom the principles show up can provide a rich source of learning. | • Reflective Practice  
• Design Labs  
• Interviews  
• Focus Groups  
• Most Significant Change  
• Appreciative Inquiry  
• In-depth Case Studies |

Source: https://ssir.org/articles/entry/evaluating_complex_social_initiatives#
Let’s evaluate this session together