Beginning Evaluation:

Tips for Getting Started

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Program evaluation is the systematic, intentional process of collecting, analyzing, and using quantitative and/or qualitative data to critically examine a program's design and performance

But…

not everything that is measurable is meaningful
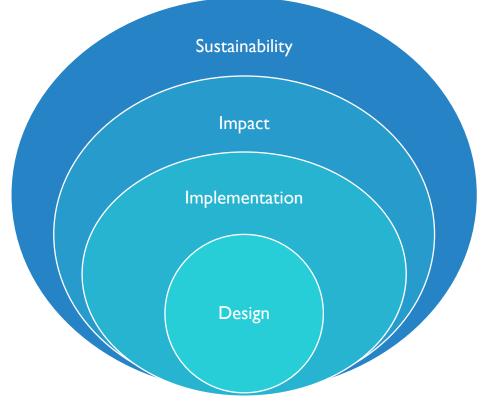*and not everything that is meaningful can be measured*

First, understand *why* we are evaluating

Is the goal formative or summative?

Then understand *what* we are evaluating

Scope , scope, scope (including what you are *not* evaluating)

Sustainability

Impact

Implementation

Design

Does the program deliver good value for money? Is it scalable, financially as well as organizationally? Can it be replicated and/or adapted and when?
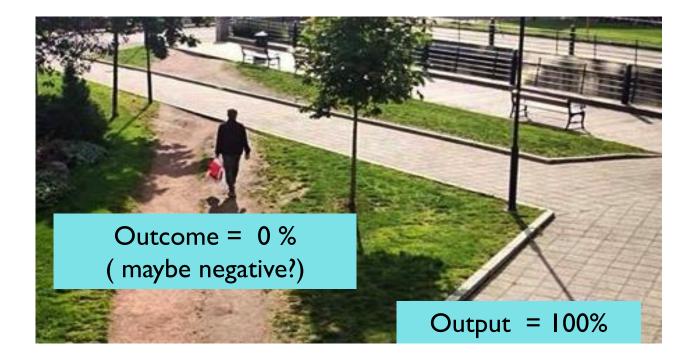
Is the program effective for its intended participants and outcomes? How else did the program change participants and other stakeholders?

How well is the program managed in practice? Are the proposed activities carried out as planned and the products/services delivered?

Is the intervention approach theoretically sound and fit-for-purpose? Does it address a justifiable need in an appropriate way? Is the program organization sound?

Outcome = 0 %
(maybe negative?)

Output = 100%

Be as clear as possible about metrics

Evaluation goals and metrics need to be concrete and strongly linked to program goals

Specific	• Include the precise "who", "what", and "where" affected
Measurable	• Focus on "how much" change
Achievable	• Reasonably reflect program resources/time
Relevant	• Clearly related to program goals
Time-bound	• Focuses on "when" : short term, intermediate or long-term

Build in both quantitative and qualitative perspective

Both data and storytelling matter, in analysis as well as reporting

Deductive, numerical responses used to estimate magnitudes and test hypotheses

Inductive, open-ended textual or visual response used to describe and explain phenomena
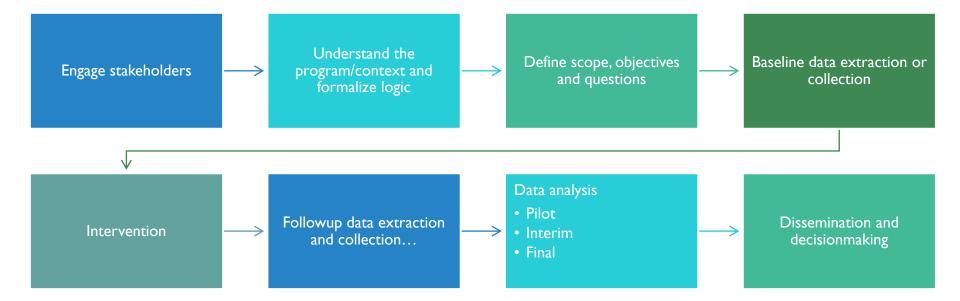

Subject to sample size requirements and appropriate statistical testing

Subject to sampling methods to ensure representativeness and data saturation
Subject to sampling methods to ensure representativeness and data saturation

Know and plan/budget for what it will take

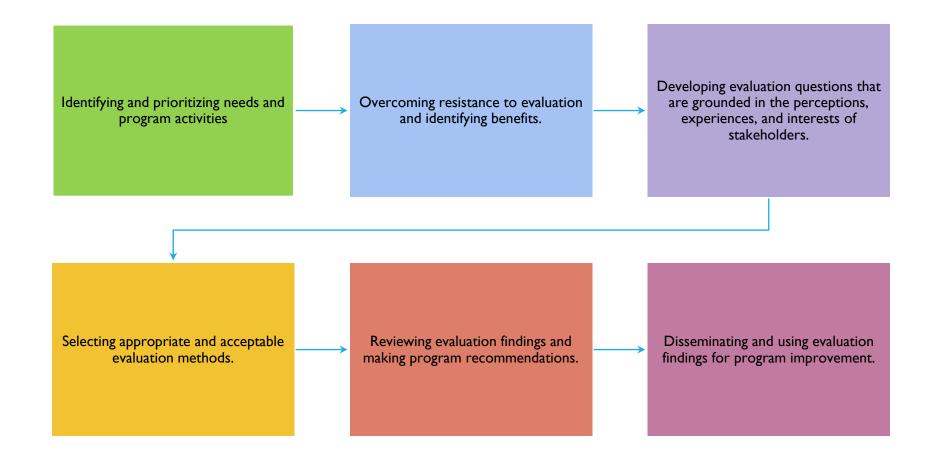Evaluation is an investment of time, skills and money (and has opportunity costs)

Engage stakeholders	Understand the program/context and formalize logic	Define scope, objectives and questions	Baseline data extraction or collection

Intervention	Followup data extraction and collection…	Data analysis • Pilot • Interim • Final	Dissemination and decisionmaking

Know and plan for what it will take

…but also creativity and collaboration

- **Program / Initiative Staff**
  Staff, Leadership, Others accountable for program/project

- **Organizational Leadership**
  Executives, Board of Directors, Advisory boards

- **Grantees**

- **Program / Initiative Beneficiaries**
  Participants, Clients, Patients

- **Program / Initiative Researchers and Evaluators**

- **Volunteers**

- **Contributors**
  Founders, Donors, Other funders and co-funders, Collaborating organizations

- **Community Groups and Leaders**
  Community-based organizations, Community leaders, Religious leaders, Law enforcement, Community service groups, Business leaders

- **Experts**
  Expert consultants, Evaluators of similar programs/initiatives, Researchers, Academics

- **Policy Groups**
  Policy makers (local, state, federal), Advocacy organizations, Government agencies

- **Other**
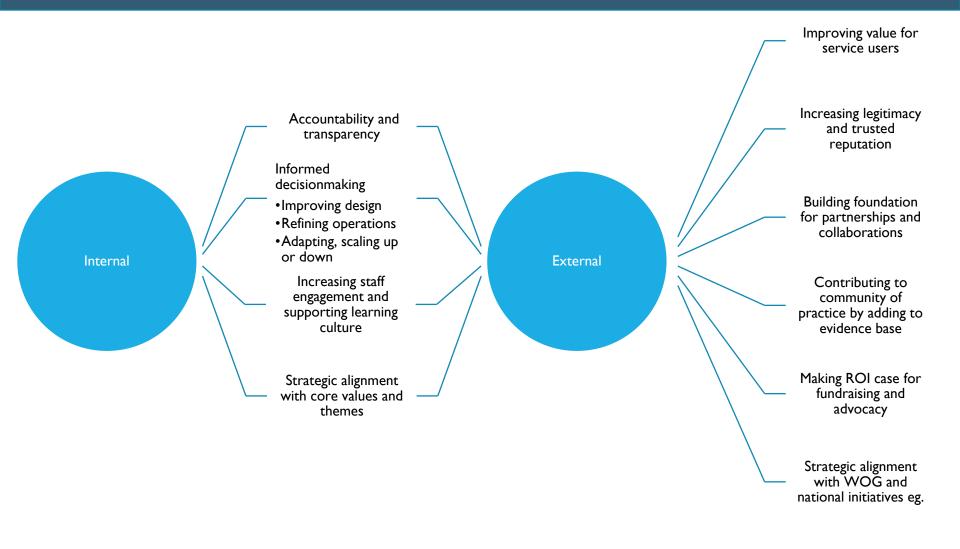 *Staff from similar programs/initiatives, Professional associations, Media*

From the start, consult with stakeholders

It is critical to ask the right questions (and be adaptable)

Identifying and prioritizing needs and program activities	Overcoming resistance to evaluation and identifying benefits.	Developing evaluation questions that are grounded in the perceptions, experiences, and interests of stakeholders.
Selecting appropriate and acceptable evaluation methods.	Reviewing evaluation findings and making program recommendations.	Disseminating and using evaluation findings for program improvement.

Evaluation is many things to many people…

The process of evaluation as well as findings can answer a lot of needs ….

But one thing it does *not* have to be is scientific research

Although it can overlap!

Research   Evaluation

Research
- Purpose is testing theory and producing generalizable findings.
- Questions originate from gaps in basic knowledge
- Quality and importance judged by peer-review and standards of evidence
- Ultimate test is contribution to knowledge.

Evaluation
- Purpose is to determine the effectiveness of a specific program or model
- Questions originate from key stakeholders
- Quality and importance depends on stakeholders' who will use the findings
- Ultimate test is usefulness in learning and decisionmaking

Patton, Michael Quinn (2014). Evaluation Flash Cards: Embedding Evaluative Thinking in Organizational Culture. St. Paul, MN: Otto Bremer Foundation, ottobremer.org

Methodological rigour is one but not the *only* criteria

Know what you should you expect from an evaluation / evaluator

Useful
- Responds to needs at each stage of the program cycle
- Makes specific recommendations
- Timely and effective in communication

Accountable
- Clear responsibility for process and findings
- Conducted ethically
- Transparent in design, conduct and interpretation, including assumptions and limitations

Accurate
- Uses valid and reliable data
- Uses best-possible methodology

Appropriate
- Identifies and includes all stakeholders
- Has credible evaluators
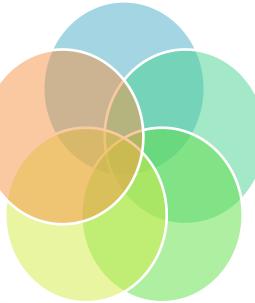- Minimizes disruption and respects rights and welfare of all stakeholders
- Value-for-money

Feasible
- Operationally possible
- Politically viable
- Fits budget and time-constraints

Being *fit for purpose* is the key…

There is no perfect evaluation/evaluator

"The practical ability to derive and communicate the best answer possible to meet the needs of the decisionmaker with the limited resources at hand"