Evaluation:
Make it Effective and Manageable

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Learning Objectives

- What level of evaluation is practical for funders, especially with limited resources and staffing

- How to gather the information you need without overburdening your grantees

- Smart approaches to evaluation that fit your needs

What level of evaluation is practical for funders, especially with limited resources and staffing?

"The <u>systematic</u> collection of information about the activities, characteristics and outcomes of program use by specific people to <u>reduce uncertainties</u>, <u>improve effectiveness</u> and <u>make decisions</u> with regard to what those programs are doing and affecting."

--Michael Quinn Patton, "Evaluation Essentials for Small Private Foundations"

What does Evaluation get a funder?

- Accountability

- A clear idea of what was accomplished

- Information about what works

- Better decision-making

- More grantee capacity

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Philanthropy Evaluation: An evolving field

- More than ever, foundations are asking: *Are we really achieving what we set out to accomplish with our grantmaking?*

- At the same time, a growing backlash against traditional evaluation

Effective Evaluation Does Not Have to Cost a Lot

- The biggest mistake funders make with regard to evaluation is….

     …assuming one size fits all.

- "Big ticket" evaluation is appropriate for *very, very few* programs that foundations fund.

- Almost all foundation programs are better served by focusing on *learning*, which is lower-cost for funders and more practical for grantees.

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What does good evaluation look like?

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Effective Evaluation

- Happens before, during, and after the grant

- Clearly identifies the evaluation questions

- Focuses on using data, not just collecting it

- Has resources allocated to it (5-10%)

- Is realistic in its expectations

- Funders walk the talk

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Seven Steps in Evaluation

Minimal Learning, Maximum Capacity Building Investment

1. Identifying and organizing the decision-makers
2. Determining who will conduct, participate in, and be the audience for the evaluation
3. Developing a *logic model*
4. Stating the *evaluation questions* and *indicators*
5. Developing the *evaluation workplan*, including the evaluation design, methods, tools, and tasks

Maximum Learning, Minimum Capacity Building Investment

6. Gathering, analyzing, and interpreting the data
7. Using the evaluation findings

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Evaluation often ≠ Learning

Evaluation	Learning
Too high a standard for success: long-term outcomes	More realistic standard for success: short-term outcomes
Assesses whole program	Assesses component parts of a program
Aspires to scientific research design that works for large-scale population studies	Focuses on context-specific, real-time learning that helps nonprofits do their work more effectively
Gathers data from the wrong source – implementers, secondary sources	Gathers data from the right source – the direct recipients/targets

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How do you gather the information you need without overburdening your grantees?

Gather Data

Don't get hung up on research design and methods; just follow these principles:

1. Fit the tool to the task.

2. Don't build what you can borrow.

3. Make the tools sharp!

4. Ask about four things:
   a. What changed for you? (outcomes)
   b. What did you experience about the program? (program quality)
   c. Tell us about you. (background traits that might matter)
   d. What did you do before that helped you achieve the desired change? (readiness)

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Gather Data (cont.)

Don't get hung up on research design and methods; just follow these principles:

5. Gather information from the audience, not the implementers.

6. Get enough voices to match the range of program experiences.

7. Make questions specific.

8. Don't ask people to figure out cause-and-effect.

9. Gather your data in time for you to use it.

What to Ask for in a Grantee Report

Minimum

Learning

Maximum

1. Outputs

2. Program quality

3. Realistic outcomes

4. Descriptions of what worked

5. How programs/services/strategies will be improved upon based on lessons regarding "what worked"

What are smart approaches to evaluation that fit your needs?

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Tips and Lessons Learned

- Let grantee decision-making be your lens

- Don't forget the value of the literature review

- ***Learning Is Not…***
  - Evaluating
  - Assessing
  - Managing Knowledge

- ***Learning Is…***
  - Making Meaning
  - Explaining
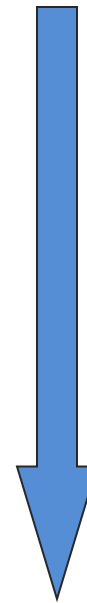 - Challenging and Changing Assumptions

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Evaluation: What NOT to do!

- Provide an unfunded mandate

- Ask: What did you learn? (too generic)

- Ask for demonstration of mission outcomes from individual grants in short timeframes

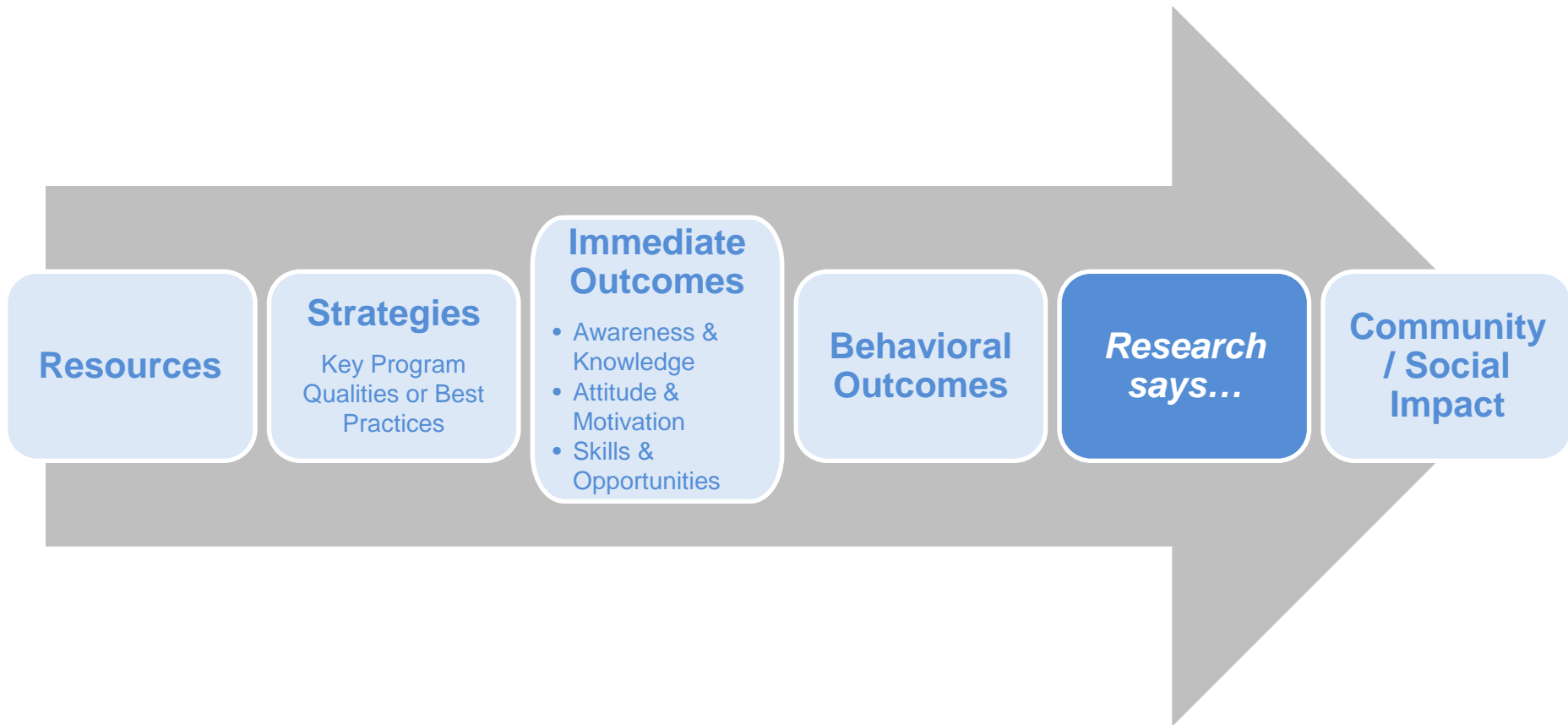- Compare grantee performance without first establishing a common, agreed-upon set of metrics

→ *Others?*

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Innovations for Consideration

- Unpack outcomes into behavioral change model (AKAMSOB)
- Cohort evaluations/peer learning
- Disseminating information in small chunks for group discussion/interpretation
- Funder collaboratives for evaluation
- R&D approach

- It's all about the path to behavior change:
  - Awareness
  - Knowledge
  - Attitude
  - Motivation
  - Skills
  - Opportunity
  - Behavior

R&D Approach to Evaluation

Resources

Strategies

Key Program Qualities or Best Practices

Immediate Outcomes

- Awareness & Knowledge
- Attitude & Motivation
- Skills & Opportunities

Behavioral Outcomes

Research says…

Community / Social Impact

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Innovations: a migration from Evaluation to R&D

Evaluation

- Extensive up front planning because it has to be right (only one shot)

- Focus on whole program

- Inferentials between whole program and outcomes

- Evaluator does analysis

- Can be replicated

- Frequently focus on LT outcomes

R&D

- Thoughtful initial planning, but have opportunity to test AND learn

- Focus on program components (what are parts of the program)

- Inferentials between program components and outcomes

- Evaluator facilitates analysis

- Designed for ongoing implementation

- Focus on ST relationship between program - outcomes

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Guiding Principles for Conducting R&D

1. Provide the technical tools and resources needed

2. Measure achievable outcomes, next actions, direct results

3. Gather as much data as is possible, QUICKLY, by quantifying the qualitative

4. Gather all data by asking the recipient/target, not the implementer

5. Analyze for patterns of cause-and-effect

6. Program leaders, designers and implementers meet often to analyze data, make meaning, and make improvements

Question, Answers and Groups