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Evaluation:
Measuring Success
Part 1

vantage point

Hello and welcome to this e-learning session on Evaluation: Measuring Success, brought to you by Columbia Basin Trust and presented by Vantage Point.

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My name is Carol Neuman and I'm the Director of Learning at Vantage Point. Vantage Point is a not-for-profit organization that supports other not-for-profits by providing foundational, advanced, and online learning opportunities. We work with more than 500 organizations and nearly 3000 not-for-profit leaders across BC.

Today, I'll be your e-learning facilitator, sharing some best practices and tools to measure the success of your projects and programs.

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In this e-learning, we will explore the fundamentals of measuring success.

A critical component of organizational planning is to set goals that line up with the activities of everyone involved with your organization. Measuring success – also known as evaluation – is a powerful way to attract new supporters and communicate your impact to funders and community stakeholders.

So, we will begin by exploring the importance of evaluation and look at how it can help you make the best use of your time, energy, money, and other resources. We'll talk about tips and tricks to get started with measuring success. Then, we will look at what to consider when you're creating your evaluation action plan and share the key steps to measure success.

Let's get started!

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What Is Evaluation?

Collecting information about the activities, characteristics and results of programs to **make improvements, increase understanding and make better decisions**.

Let’s begin by getting clear on what we mean by the term evaluation. This definition of measuring success, or evaluation, comes from Michael Patton – who is the president of the American Evaluation Association.

Notice the bolded phrases are key concepts about what measuring success and evaluation is and why we do it.

Measuring success – or evaluation – is really about knowing whether your projects, programs, or events are doing what you intend them to do. A great way to do that is by collecting the right information about your project or program activities, characteristics, and results in order to make improvements, increase understanding, and make better decisions.

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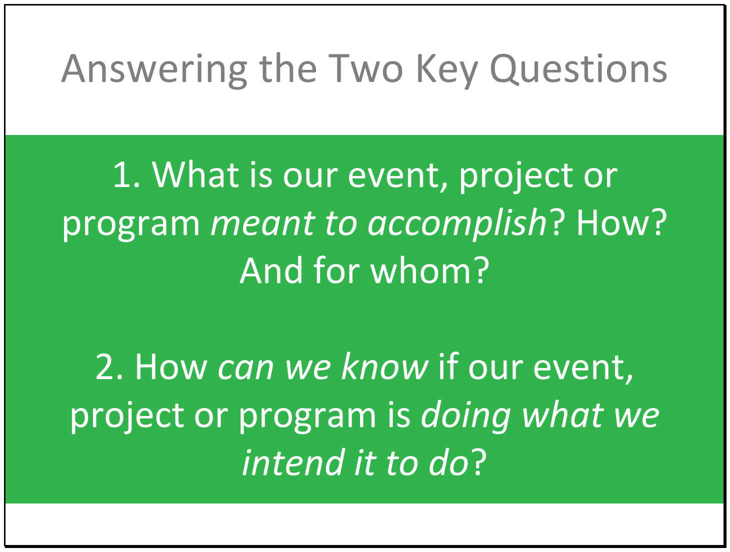

At its core, evaluation helps us answer two key questions:
- What is our event, project or program meant to accomplish, how, and for whom?
- And, how can we know if our event, project, or program is doing what we intend it to do?

So, at its heart, evaluation is pretty simple but sometimes it doesn't feel that way.

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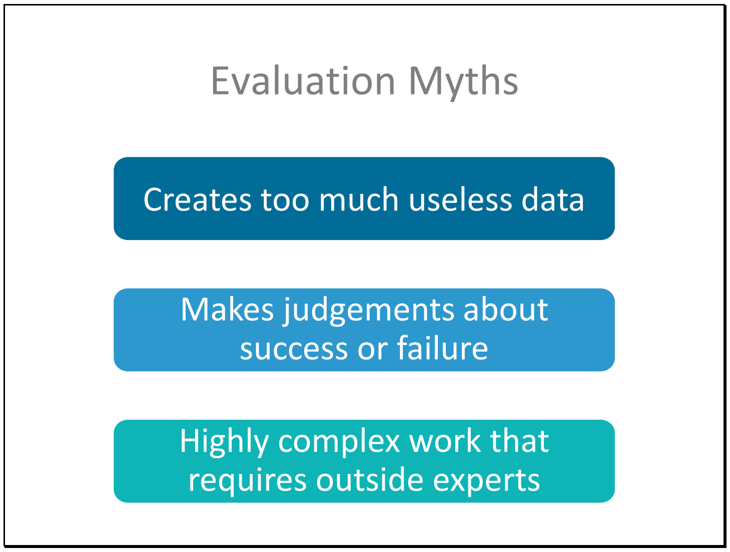

Why can evaluation seem so difficult at times? Because there are some persistent myths about evaluation. Let's take a look at the top 3.

1. Many people believe evaluation is useless; that it creates lots of boring data with unhelpful conclusions. There may have been a grain of truth about this in the past when program evaluation was focused on achieving complete scientific accuracy. The old approach to evaluation often generated incredible amounts of information, but did not focus on providing recommendations. As a result, evaluation reports tended to restate the obvious and left the people running the program disappointed. But, over the last few decades, evaluation has changed its focus to put practicality, relevance, and usefulness first. Today, evaluation begins with the questions: what do we want to know about our programs or projects and why? It's a much more specific, practical approach to getting the right information in the right ways.

2. Many people also believe that evaluation is about proving the success or failure of a program. This myth is based on the belief that success means implementing the perfect program and never having to hear from volunteers, participants, or employees again -- the program will now run itself perfectly! But, as we know, this doesn't happen in real life. Ongoing success is about remaining open to continuing feedback and adjusting the program accordingly. Evaluation is the tool that gives you this continual feedback.

3. Many believe that evaluation is a highly complex process that can only occurs at a certain time in a certain way, and almost always includes the use of outside experts. Many people also believe that in order to do evaluation they must completely understand technical terms such as

validity and reliability. These are all myths! The reality is – you don't have to be an expert or make things overly complicated to have a successful evaluation. You do have to consider what information you need in order to make smart decisions about program issues or needs. And you do have to be willing to commit to understanding what is really going on. Remember, many people who run projects, events, and programs regularly do some type of program evaluation. When you are thoughtful about what information to collect and how it will be used, you can be sure you won't miss precious opportunities to make more of a difference for your participants, have a bigger impact in your community, or get the biggest bang for your buck.

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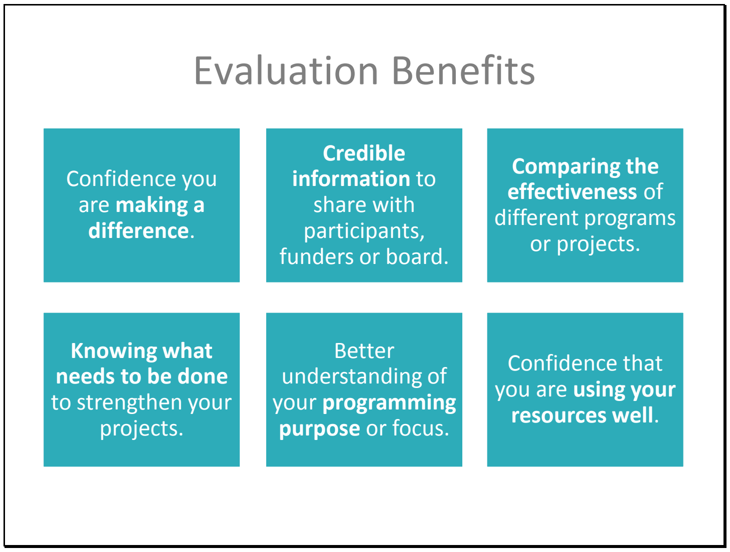

So why bother taking the time to measure success? Because evaluation can create some very powerful and helpful benefits, like:

- Knowledge and confidence that you are making a difference
- Credible information to share with your participants, board, and funders. This might include being able to communicate your success to funders and supporters – and perhaps even attract new funders and supporters
- Compare the effectiveness or outcomes between different programs and events
- Knowing what needs to be done to strengthen your projects and programs
- Increased understanding of your programming purpose and direction
- And confidence that you are using your resources well

And it doesn't end there. You may also be able to:

- Know where to put your resources for future projects
- Create a legacy or history of your programming
- Attract new participants to your organization
- And produce stronger outcomes -- because measuring results produces results

If you look at this list closely, there are some key words that might stand out, like confidence, understanding and knowledge. That's because measuring success is all about discovering and learning new things about your projects and programs!

What else would you add to this list? What information or insights do you wish you had on hand? Evaluation might be a great way of gathering that information.

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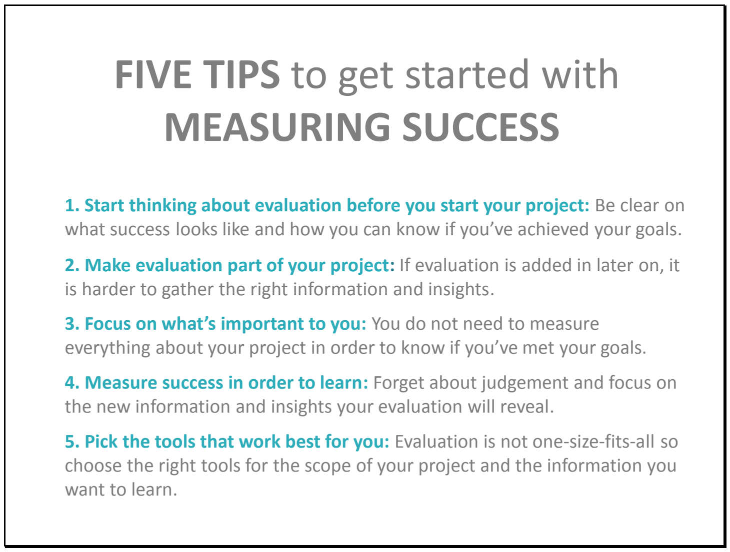

You're probably eager to start putting evaluation to work for your projects and that's great. Here are five tips to keep in mind to get you started:

- Start thinking about evaluation before you start your project. Be clear on what success looks like and how you can know if you've achieved your goals. Don't forget to link your evaluation plan to your overall program or project goals.
- Make evaluation part of your project planning process. If evaluation is added in later on, it is harder to gather the right information and insights at the right point in time.
- Focus on what's important to you so you can use your resources wisely. You do not need to measure everything about your project in order to know if you've met your goals.
- Measure success in order to learn. Focus on the new information and insights your evaluation will reveal about your project or program. It's not about judgement, it's about insights.
- Pick the tools that work best for you. Evaluation is not one-size-fits-all so choose the right tools for the scope of your project and the information you want to learn. Match your evaluation plan to the scope of the project and questions you need to answer. A tiny one-day event doesn't require big-time evaluation. Similarly, you'll want to consider:
    - Your project or program funding source. Some sources, particularly large foundations, will tell you what kind of evaluation they want to see.
    - Your needs - Do you need to prove a concept? Show outcomes to raise money? Or just satisfy your curiosity?
    - Your resources - Do you have an evaluator on staff, or the funds to hire someone out of house? Or are you a small operation?

And if there's a sixth tip? Practice makes perfect! You will get better at this the more you do it.

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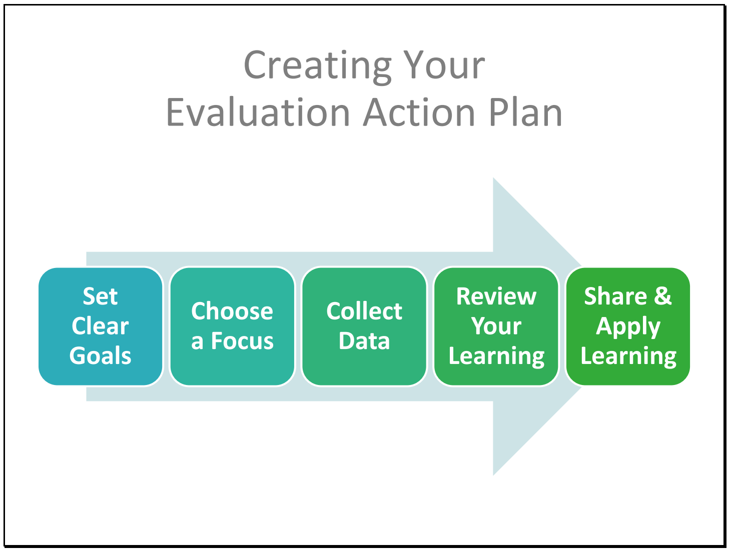

Great evaluation always begins with an action plan.

An evaluation action plan is like a roadmap. Without a roadmap, evaluation becomes pretty tricky. How will you know what steps to take or which way to go if you don’t know where you are right now or where you want to end up? Your action plan will help you get clear on that.

The great news is creating a strong action plan is pretty straightforward. There are 5 core steps in planning a program evaluation. They are:

- Setting clear goals
- Choosing a focus
- Collecting data
- Reviewing your learning
- Sharing and applying your learning

We will look at each of these one by one, and focus on the types of questions you might want to consider at each step.

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It's important to be clear about your purpose for evaluating your project, program, or event so it's helpful to start with answering the question "Why?" What's the most important thing you want to learn about your project or program?

One useful way to explore this might be to complete the sentences you see on screen.

Here's an example. Imagine you're part of a 4H club that wants evaluate their Youth Leadership Development Program. You might complete the sentence this way:

We are conducting an evaluation of our "Youth Leadership Development Program" because we want to know whether youth participants increased their self-awareness of their own leadership strengths and used leadership skill-building activities in order to report the value of this program to our funder.

What I want to emphasize here is that this statement is clear on how the data or information you collect will be used. You're not asking for feedback just for the sake of it – there's a clear purpose.

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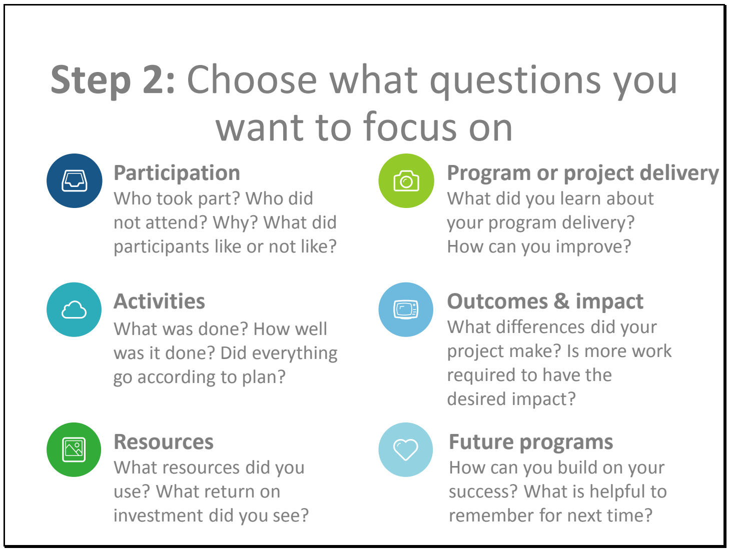

At Step 2, we start getting more specific about what you want to know. What questions do you want to answer? Keep focused on your evaluation goal or purpose.

That will help you identify whether you might want to focus on questions about…

Participation: What happens for different participants? Who took part? How many people? Who did not attend? Why? What did participants like or not like?

Activities: What was done and how well was it done? Did everything go according to plan? What worked well or not so well? Which activities link to different outcomes for different participants? What worked the best?

Resources: What resources were used? What investments did you make of volunteer or staff time? Of money? Or funders? Who collaborated on the project? What returns on investments did you see?

Program or project delivery: What did you learn about how you delivered your program or event? In the future, how might you improve?
Outcomes and impact: What differences did your project make for your participants or community? Does your project require additional work to achieve your intended impact?

Future programs: How can you build on the outcomes of this project or program in the future? What have you learned that would be helpful to remember for next time?

What I want to emphasize here is that you are not expected to answer all of these questions. Instead, focus on a few that are most important to you.

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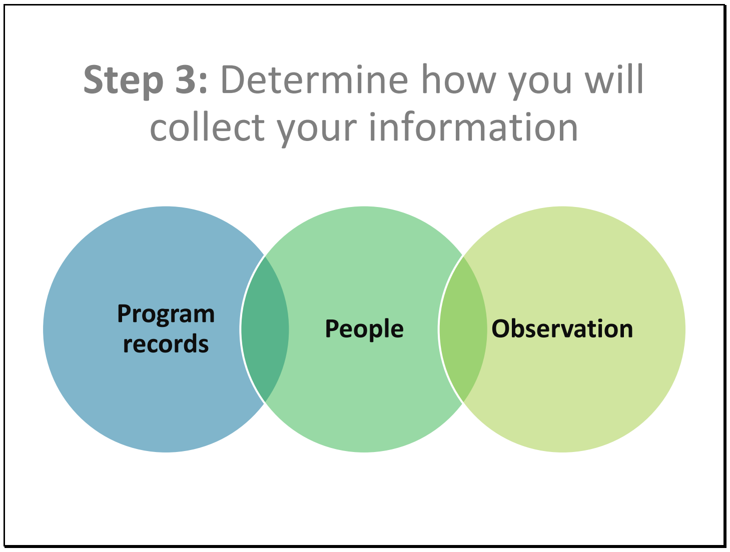

Once you have your key questions in mind, you can move on to Step 3. This is the point when you start to explore how and from whom you will get the information you need. There are three main sources of information you can draw on:

The first is from program or project records – this could be financial information about your event, a program history, or project plans and documents. The good news is, with this type of information, you already will be collecting a lot of it in order to run your program or event.

The second source comes from asking people to share information – these people might include event attendees, program participants, or volunteers. Some ways you can gather information from people might include interviews, surveys, or focus groups.

And the third is from observations – either your own observations or participants sharing their observations. If it is you observing events, perhaps this happens through a journal or logbook. Or, you can ask participants to create one. Or, it might be through videos or photos they take to record their progress.

So as you think about which ways of collecting information are most useful to you, you may wish to consider how you'll share your results. What do you want to be able to report? If you want to report information about program participation, collect that information! If you want to report people's experiences and stories, think about ways you can tap into that.

Again, you don't have to know everything or report on everything about your project in order for your evaluation to be useful and informative. It's okay to choose one or two questions you really want to learn more about, then select one or two ways of gathering information about that topic.

Let's think again about our 4H Youth Leadership Development Program example. In that example, we said we wanted to know whether youth participants increased their self-awareness of their own leadership strengths and used leadership skill-building activities. So, it might be useful to focus on people as your way of collecting data. You might think about creating a survey for participants to complete after the program is finished and compare that to a program application or intake form. If you design your evaluation before the program begins, it will give you the chance to make sure the questions on the application form and on the final evaluation survey are similar enough that you can clearly see the changes your program has made.

We'll explore different tools for gathering information in more depth in part 2 of this webinar.

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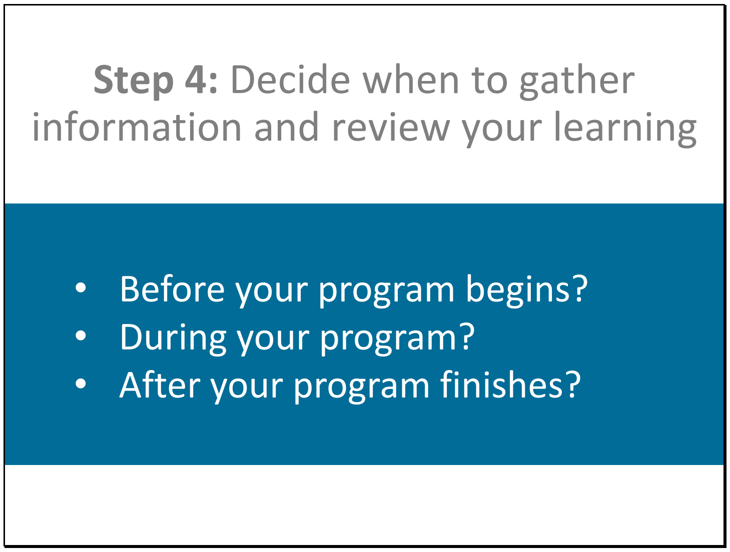

By the time you get to step 4, you should have clarity on the specific goal or outcome you want to explore, clarity on the questions you want to ask and clarity on how you will ask them. At this point, it's time to start thinking about when you want to gather and review that information.

There are really three options here:

- Before your program or event begins
- During your program or event, and
- After your program or event wraps up

In some cases, it may be a blend of gathering information at different points in time. For example, imagine you are launching a brand new program. You've decided to focus your evaluation plan on two types of questions: how your program is being delivered and who your program participants are.

To answer the first type of questions, you may wish to do some monitoring during the program to make sure you're on track with how your program is being delivered. But that information needs to be reviewed in a timely way! If you ask people to provide feedback, you ought to be prepared to review and take action on that feedback quickly.

To answer the second type of questions – who are your program participants – you can gather information about program participants and review this information before your program starts.

It’s important to not only collect the data at the right point in time, but also to review it at the right point in time.

Let’s consider another example. If you’re running the same event you’ve delivered many times before, it might be a better use of your time to only gather information and review it after the event happens to get a clear sense of your results.

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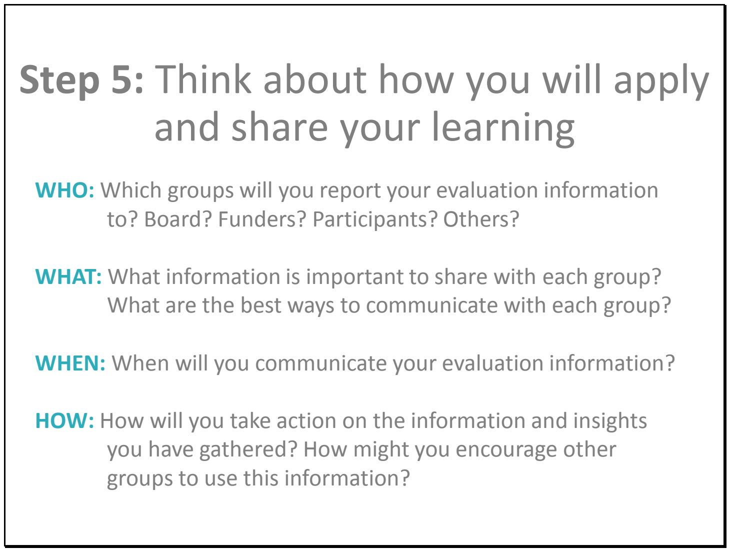

The last piece of the evaluation action plan is about applying and sharing your learning.

WHO: Who should be informed about your project results? Which groups will you report your evaluation information to? Board? Funders? Participants? Others?

WHAT: What information is important to share with each group? What are the best ways to communicate with each group?

WHEN: When will you communicate your evaluation information? Is it right away? Part of an annual report? If you're reporting to a funder, they may have specific timelines or deadlines you have to meet.

And finally, the question of HOW: How will you take action on the information and insights you have gathered? How might you encourage other groups to use this information? This last piece is a crucial evaluation step that's often overlooked: applying what you've learned!! There's no point taking the time to gather information if it's going to sit in a binder on a shelf.

There are a lot of creative ways to share information with your stakeholders. Don't limit yourself by thinking a lengthy report is the only way to go.

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Evaluation and measuring success is easier than it might seem. It all begins with thinking about what you want to learn about your programs. By starting with that end in mind, you can build evaluation into your projects, programs, and events. This will help you focus on asking the right questions. And, it means you will get the right information to share with your funders, board, participants, and community.

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Thank you for taking part in this e-learning session. We hope you join us for Part 2.