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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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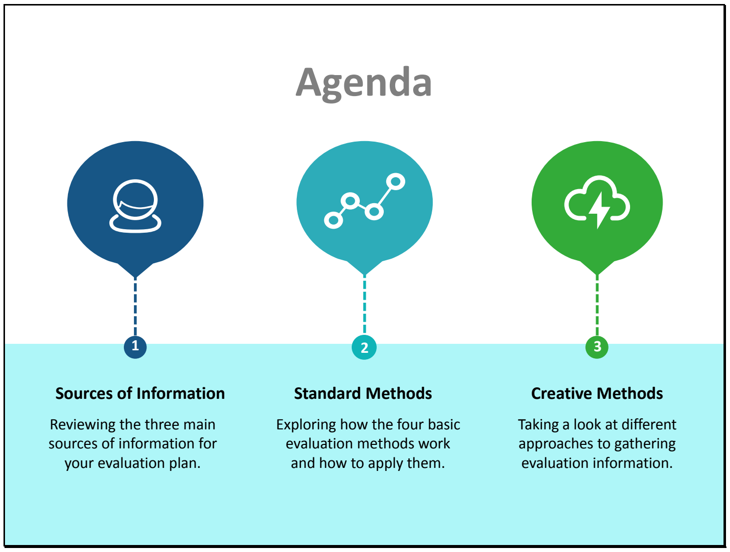


In this e-learning, we will continue to explore the fundamentals of measuring success and focus on choosing and using the right tools for your evaluation project**.**

Over the next 15 minutes, we will review tools to enable you – whether you're a staff member, part of a working board, or a volunteer – to build measures of success. We will start by looking at the three key sources of information. Then, we'll look at the four standard methods you might use in collecting information. Finally, we'll close by exploring three creative or innovative ways to monitor success.

Let's get started!

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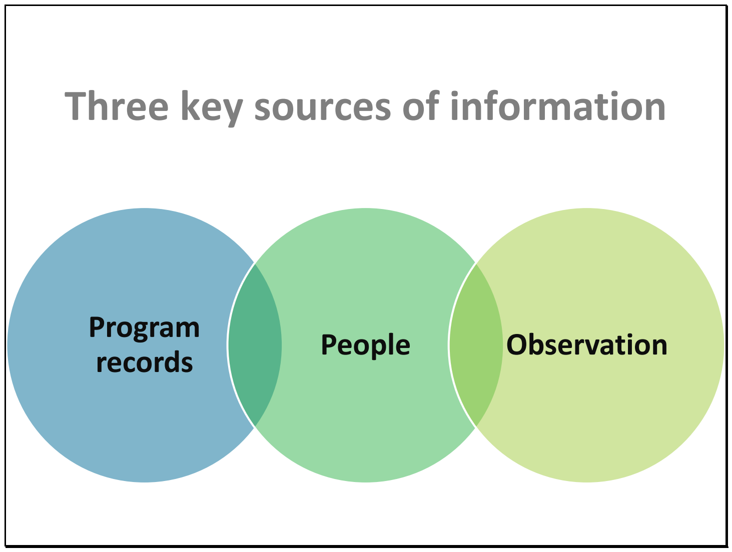


In part 1 of this webinar, we introduced the three key sources of information. To review, you might gather information for your evaluation:

- From program or project records – this could be financial information about the project, or program documents. With this type of information, you will already be collecting a lot of it in order to run your program or event.
- From people – and this might mean event attendees, program participants, or volunteers. Some ways you can gather information from people might include interviews, surveys, or focus groups.
- The third source is from observations – this could be either you observing events or participants sharing their observations. This might be through a journal or log book you ask participants to create. Or, it could be through videos or photos they take to record their progress.

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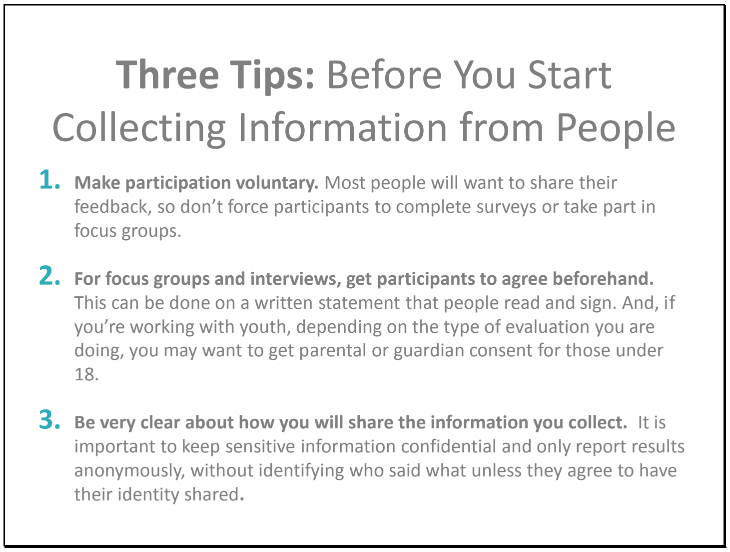


Here's something to keep in mind if you're going to base your evaluation on asking people to share information about their experiences. These are not hard and fast rules, but good practices to keep your evaluation running smoothly and increase your participants' ability to share meaningful insights.

- **Make participation voluntary.** Most people will want to share their feedback, so you really don't need to force participants to complete surveys or take part in focus groups. If you tell participants why you're gathering feedback and how it will be used to strengthen your programs or projects, you will create a desire for them to participate in your evaluation.

- **For focus groups and interviews, get participants to agree beforehand.** This can be done on a written statement that people read and sign. If you're working with youth, and depending on the type of evaluation you are doing, you may want to get parental or guardian consent for those under 18. How do you know if this is a good idea? A good guideline is: if you need parents to sign consent forms for their children to participate in your program, you may want to think about doing the same for your evaluation.

- **Be very clear about how you will share the information you collect.** It is important to keep the information you collect from participants confidential and only report results anonymously. Make sure that you don't share things in a way that reveals who said what without unless that person agrees to it first.

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Now, let's go more in-depth by exploring some standard ways or methods of gathering information.

There are many methods of data collection – some are standard and some are more creative. Each has its own strengths and weaknesses. The 'art and science' of data collection is to select the method appropriate for the purpose of your evaluation, the audience you are collecting information from, and your resources.

As you think about which methods of collecting information would be most useful to you, you may want to consider how you'll be sharing your results. What do you want to report on? If you want to report information about program participation, collect that information! If you want to report people's experiences and stories, think about how you can tap into that.

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**Method #1:** Reviewing Records

**How it works:** Gathering and reviewing records like program applications, event finances, or project meeting minutes and creating a summary report.

With our first method, you will look at existing records and forms. This is all about gathering and reviewing records like program applications, event finances, or project meeting minutes. Then, you can analyze them and create a summary report.

Take a few minutes and think about the various records and forms you have that either:

- already have data that you can use for your evaluation; or
- you can modify to collect the data you need (perhaps, by adding a question or two).

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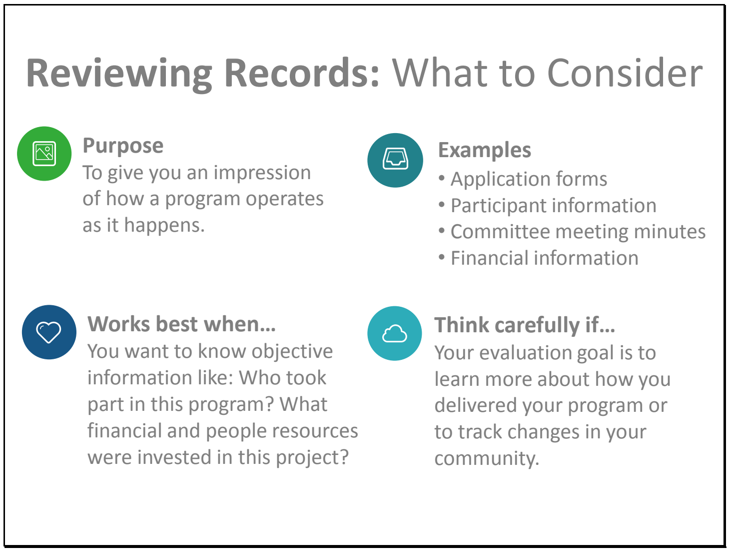


Reviewing records as your evaluation method can help give you an impression of how a program operates as it happens. And, you can generally do this without interrupting the program.

It allows you to review information that already exists and gives you flexibility in what to focus on. There are many types of records you might review:

- Forms that are completed by participants, like program applications or registration forms, may contain useful data. For example, they may contain answers to questions like, “What are your reasons for wanting to attend this program?”

- Reviewing event finances can be a good indicator of how successful your efforts were in attracting people to your project, which funders were most interested, and how monies were spent.

- Committee and participant lists can be helpful, too. You probably keep a variety of lists that can be used to track numbers and key demographics of who is (and who is not) signing up for what. You can monitor trends over time and get an idea of how participants are perceiving the program.

This method can help you tap into historical information and be very comprehensive. Because it is seen to be impartial, you might want to share this information with funders.

However, sometimes reviewing records can be time consuming and your information may be incomplete. It’s important to remember your goals and be clear about what insights you are looking for.

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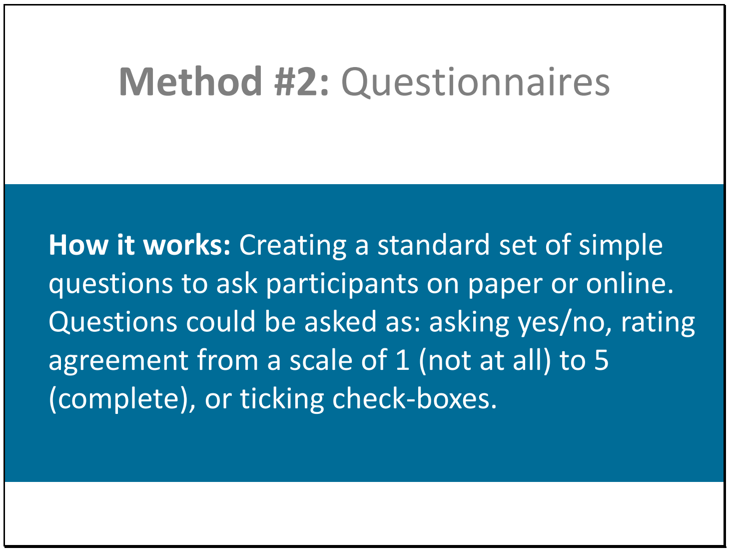


Surveys, end-of-session questionnaires, interviews, and focus groups have become popular ways to collect data.

Here is how it works: first, you create a standard set of simple questions to ask participants, either through a paper survey or an online tool. Try to create a range of options like: asking how much do you agree, from a scale of 1 (not at all) to 5 (completely). Or, do a series of yes/no answers on a check-list – this can be a good way to think about attitudes or beliefs. Then, you will summarize all the data you collect and share it in a report.

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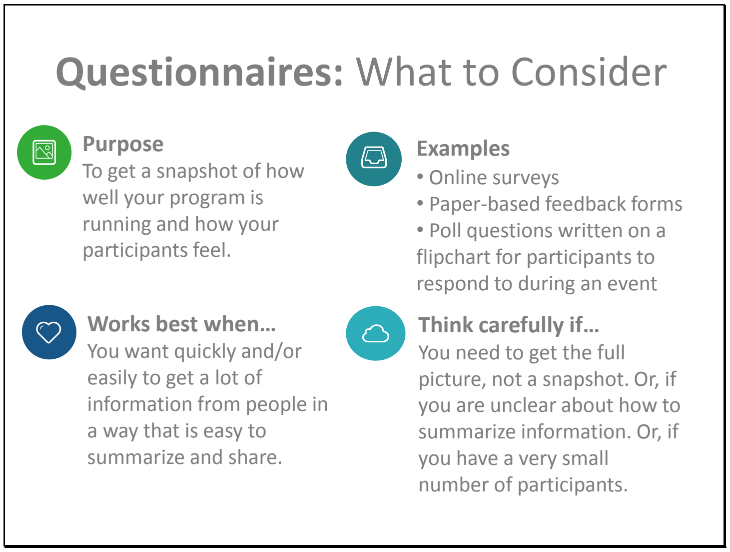


Questionnaires can be a great way to get a snapshot of how well your program is running and how participants feel.

How you use questionnaires can be very flexible. Some options include:

- Online surveys sent before and after a program
- Paper-based feedback forms handed out to participants at the end of a project
- Poll questions written on a flipchart for participants to respond to during an event

This method is great when you need to quickly and easily get lots of information from people in a way that is easy to summarize and share. Other benefits include:

- Can be completed anonymously
- Is inexpensive to administer
- Is easy to compare and analyze
- Can be administered to many people
- Can get lots of data
- Many sample questionnaires already exist online

You should think carefully, however, if you need to get the full picture and not a snapshot or if you are unclear about how to summarize information. As well, don’t expect to get careful, detailed feedback. Questionnaires can feel a bit impersonal, too.

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## **Method #3:** Conversations

**How it works:** Begins with standard questions asked one-on-one, or to a group of participants and can follow-up on themes. Can blend set questions with open-ended questions to allow for unexpected insights to be revealed.

The next method is having conversations with participants.

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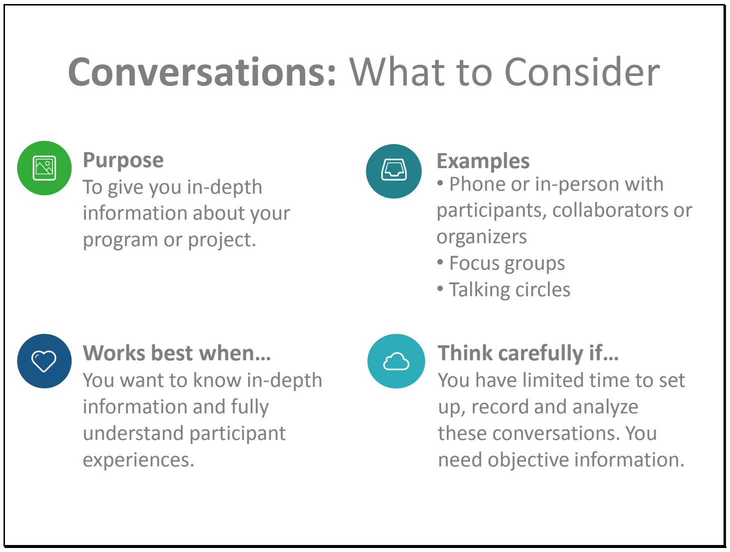


Using conversations is beneficial when you want to fully understand someone's impressions or experiences, or learn more about their answers to questionnaires. It can give you in-depth information about your program or project.

Examples include:
• Phone or in-person conversations with participants, collaborators, or organizers
• Focus groups – which are in-depth, structured group discussions with several program participants. This is typically used to get common impressions.
• Talking circles where people sit in a circle and each participant is asked to provide comments about their experiences and benefits gained from the program. These are commonly used to get individual impressions.

This approach can work best when you want to know in-depth information and fully understand participant experiences. It can help you get the full range and depth of what's happening in your program and can help you develop a relationship with participants.

You may want to think carefully if you have limited time to set up, record, and analyze these conversations or if you need objective information or numerical information. Keep in mind that interviews and group conversations can be hard to analyze and compare.

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## **Method #4:** Observations

**How it works:** Asking people connected to your project to record their experiences and insights. You can provide guidance on what elements you would like them to reflect on or leave things open-ended.

The final standard method is observation.

This works by asking people connected to your project to record their experiences and insights. You can provide guidance on what elements you would like them to reflect on or leave things open-ended. There are many different ways to gather observations.

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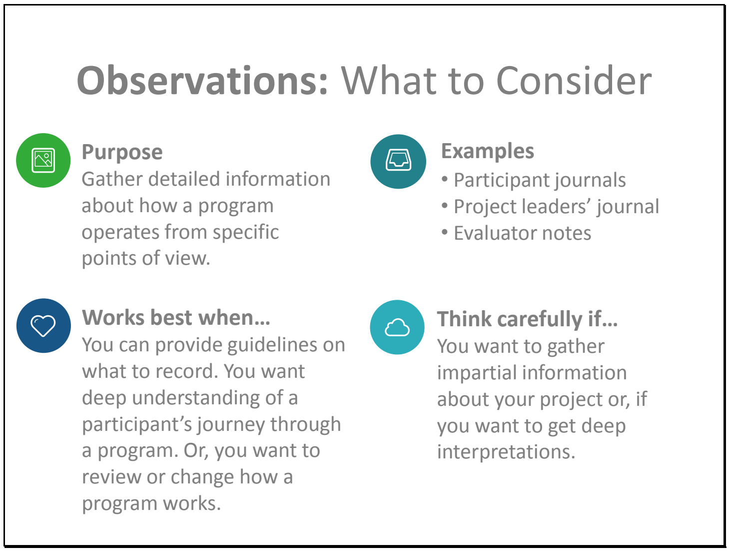


Observations are meant to gather detailed information about how a program operates from a specific point of view, whether that is from a participant, a project leader, or an external evaluator.

Some examples might include notes or a journal. Journals can be rich sources of information as they are quite personal and allow participants or leaders to think about their experiences, what they are feeling and thinking, and provides a useful ongoing account of an activity or experience.

One thing to keep in mind about journals is that guidance and structure can be incredibly helpful. It's about more than simply giving someone a notebook! When using journaling to collect evaluation data from participants, be clear about what you want to know and give them a list of questions to address. You might also consider a group journal where all participants write and share their experiences and thoughts in a combined effort.

Observation works best when you provide guidelines on what to record, when you want deep understanding of a participant's journey through a program, or, you want to review or change how a program works. It can be helpful because you can get a view of operations of a program as they are actually occurring and adapt quickly.

If you're planning to use observation, you might want to think carefully if your goal is to gather impartial information about your project or if you want to get deep interpretations. Every observer will have a different interpretation of what is really happening with your project. Sometimes, finding themes in different people's observations can be difficult and unhelpful. And, be aware that if you are engaging an outside person to do observation, it may influence participants' experiences.

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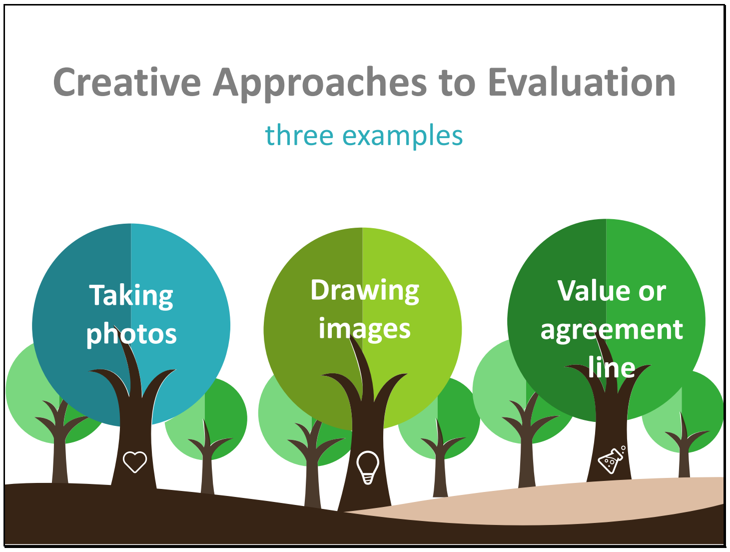


What other ways can you collect data that may be more novel, more appropriate and yield better information? There is a whole different set of approaches to evaluation that taps into different types of responses. Various forms of creative expression can be used to collect evaluative data to document changes in knowledge, attitudes, skills, feelings, and behaviors.

Creative approaches can…

- Help a group share what is meaningful to them and express complex ideas that might be hard to get at in a questionnaire
- Provide an opportunity for reflection
- Trigger memories that can lead to a group discussion
- Help build a sense of accomplishment
- Use the power of imagination
- Provide a non-verbal way to share ideas
- Provide expressive materials that can be shared with stakeholders
- Allow everyone to participate, not just those who are brave enough to speak up in a group

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**Creative Method #1:** Photos

Have participants take photos at events, during program sessions, or before and after a project is completed. Or, ask participants to keep a photo diary of their experiences or changes they are noticing as they move through the program.

Photos are a powerful way of collecting information. It can be done very simply and allows people to be creative even if they don't feel they have any true artistic ability. It can also help individuals express themselves more fully than when they are simply asked questions.

There are many ways to use photos in evaluation. You could have participants take photos at events, during program sessions, or before and after your project is completed. You could also ask participants to keep a photo diary of their experiences or changes they are noticing as they move through the program.

Participants might be asked to take a series of photos and then select a few that best represent their experiences. For example, you might ask participants in your project to select three photos that describe what they learned in your program or three new ideas they will share with other people. You could then have participants gather in small groups to discuss their photos, why they took the photo, and what it means to them. If you wanted, comments and remarks could be recorded.

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## **Creative Method #2:** Drawing

Ask participants to tap into their creativity and draw their experiences. Examples include a map of the journey through a program, a visual story of a particular program experience or topic that was memorable.

Drawing is another creative method of gathering feedback. Here, you might ask participants to draw their experience by creating a map of their journal through a program or create a visual story of a participant experience or topic that was memorable.

For example, if you wanted participants to create a storyboard, here's what you might try: At a few points during your program, ask participants to draw a picture of how they could apply something that they learned in the program. Give each person or group a specific aspect to draw or let them identify topics they feel would provide useful evaluation information.

Over time, they will have created a series of pictures, illustrations, or graphics that tell a story about a program, its impact, and what participants experienced.

You can have people select certain drawings and create a storyboard of them, either individually or as a group. Once the storyboards are complete, share and discuss. You can also record comments as additional evaluation information.

Drawing may not be appropriate for all types of programs but, when used well, it can be a powerful form of nonverbal form of communication that can be analyzed for structure or content. If you're working with youth, drawing can tap into something that feels easy because drawing is a natural mode of expression for many young people.

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**Creative #3:** Value Line

Post signs on the wall or floor that provide a rating scale or agreement. Ask people to position themselves along a line to show their position on a topic. Count the number of people standing in the different areas and record the numbers.

In a value line, people position themselves along a line to denote their position about a topic. Signs are often posted on the wall (or along a line on the floor) that provide the rating scale (for example, strongly agree to strongly disagree; very helpful to not helpful).

This method can help you develop clear, strong statements that relate clearly to the topic and to what you are measuring. You can use the value line at the end of an event or use it at the beginning and at the end to collect information that will let you compare differences your program has made.

Imagine your team is organizing a monthly summer farmer's market – or any other event – in your community. Now, the involvement of volunteers in your monthly events is crucial! Everything at your events has run smoothly and volunteers appear to be enjoying their roles. However, you know you don't want to rely on surface-level impressions to know how effective your volunteer engagement has been. So, at the end of the summer, you have a plan to get feedback from your volunteers in a way that is fun and engaging: you decide to use a value line exercise with volunteers.

At your volunteer wrap-up event, you could ask volunteers to arrange themselves according to how much they agree with statements like:
I feel connected to the community
I learned something new
I knew what was expected of me as a volunteer
I would volunteer with the farmer's market (or whatever your event is) again
I would encourage a friend or family member to volunteer with this event

Record where people stand. You can also use this process to have a discussion about why people took various positions.

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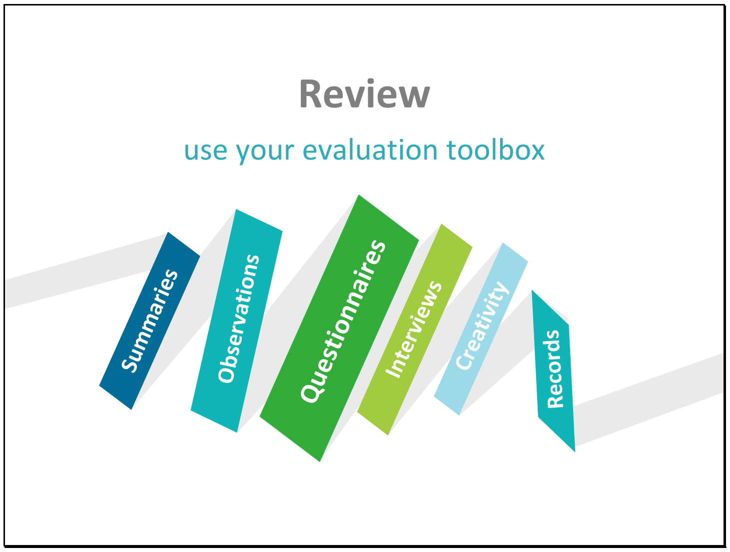


In review, remember that you have many options for evaluation!

There are many tools - most of which are simple and cost-effective - that can help you gather the insights and information you need to strengthen your programs, projects, or events. Whether you choose a standard method or a creative one, you can learn from the experience and grow more confident with your evaluation abilities the more you practice.

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Thank you for joining us. We hope you join us again next time.