AGENDA

5:45 p.m. - 6:10 p.m.	Arrivals & Refreshments
6:10 p.m. - 6:15 p.m.	Welcome & Introductions
6:15 p.m. - 6:40 p.m.	Making the Case for Evaluation: *Presentations + Questions & Answers*
6:40 p.m. - 7:05 p.m.	Program Evaluation Methods: *Case Studies*
7:05 p.m. - 7:50 p.m.	Interactive Exercise: *Design an Evaluation Process*
7:50 p.m. - 8:00 p.m.	Closing Remarks & Evaluations

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RESOURCES

Community Toolbox, Section 5: Developing an Evaluation Plan
http://ctb.ku.edu/en/table-of-contents/evaluate/evaluation/evaluation-plan/main

The Michigan Nonprofit Management Manual, 5th Edition
http://www.mnaonline.org
A comprehensive resource and reference guide for nonprofit organizations. $75 for MNA members, $95 nonmembers. For organizations under $100,000 budget, membership is $80.

W.K. Kellogg Foundation Evaluation Handbook
https://www.wkkf.org/resource-directory/resource/2010/w-k-kellogg-foundation-evaluation-handbook
This handbook provides a framework for thinking about evaluation as a relevant and useful program tool.

W.K. Kellogg Foundation Logic Model Development Guide
https://www.wkkf.org/resource-directory/resource/2006/02/wk-kellogg-foundation-logic-model-development-guide
Nonprofits today are being pressed to demonstrate the effectiveness of their program activities by initiating and completing outcome-oriented evaluation of projects. This guide was developed to provide practical assistance to nonprofits engaged in this process.

EVALUATION SERVICES

Michigan Community Resources
http://www.mi-community.org
Michigan Community Resources provides fee-based evaluation services for nonprofit organizations.

JFM Consulting Group
http://www.moving-the-needle.com
JFM Consulting Group provides a variety of services, including evaluation.

WHY EVALUATE YOUR PROGRAMS?

Program Evaluation is the act of reflecting upon the quality and success of your organization's work.

EVALUATE YOUR PROGRAMS TO:

1. **Increase the impact of products or services on clients.**

   Too often, service providers (for-profit and non-profit organizations) rely on their instincts and passions to conclude what their customers or clients really need. Over time, these organizations find themselves guessing about what a good product or service would be, and find themselves in a trial and error cycle of how new products or services could be delivered.

2. **Improve delivery mechanisms to be more efficient and less costly.**

   Over time, product or service delivery can end up being an inefficient collection of activities that are more costly than need be. Evaluations can identify program strengths and weaknesses to improve the program.

3. **Verify that you're doing what you think you're doing.**

   Typically, plans about how to deliver services end up changing substantially as those plans are put into place. Evaluations can verify if the program is really running as originally planned.

4. **Verify if organizational planning strategies are working and whether they need adjustment.**

   Strategic Planning is the blueprint or scheme describing what needs to be accomplished in an organization. An effective evaluation process tests the assumptions of your strategic plan and allows for the opportunity to make adjustments as needed.

5. **Guide your organization in hiring the right staff for the work to be done and in making good use of volunteers' time and energies.**

   Staff and volunteer evaluations are equally as important as program evaluations.

6. **Assist your organization in budget drafting and assessing resource allocation based on need.**

   No organization has unlimited resources, and having a tool to assess how to allocate resources effectively is critical in the nonprofit market.

7. **Strengthen fundraising activities by arming your organization with data that can be used to demonstrate impact to foundations and donors.**

   Evaluations are increasingly required by nonprofit funders as verification that the nonprofit is indeed helping their constituents.

Source: Basic Guide to Program Evaluation, Carter McNamara, Authenticity Consulting http://www.authenticityconsulting.com/. Retrieved March 23, 2016; Community Toolbox Section 5: Developing an Evaluation Plan http://ctb.ku.edu/en/table-of-contents/evaluate/evaluation/evaluation-plan/main Retrieved March 23, 2016; Nonprofit Kit for Dummies 4th Edition. Stan Hutton and Fraces N. Phillips

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WORKING THROUGH THE PROGRAM EVALUATION PROCESS

EVALUATIONS HAVE THREE MAIN COMPONENTS:

- ☐ **Step 1: Setting up an evaluation**

  This step involves determining what type of evaluation you need to perform – refer to the "Some Major Types of Evaluation" handouts; asking the right questions; assigning someone the responsibility to gather and analyze the information you need to answer those questions; and deciding where and how you'll find that information.

- ☐ **Step 2: Conducting the evaluation**

  This step involves gathering the information needed in a consistent manner and measuring the results in an honest (perhaps self-critical) way. Devising the tools to gather that information include the development of surveys, focus groups, formal observations, or one-on-one interviews – refer to the "Methods to Collect Information" handout.

- ☐ **Step 3: Interpreting the data**

  When analyzing data (questionnaires, interviews, focus groups, etc.), always start from review of your evaluation goals, i.e., the reason you undertook the evaluation in the first place. This will help you organize your data and focus your analysis. For example, if you wanted to improve your program by identifying its strengths and weaknesses, you can organize data into program strengths, weaknesses and suggestions to improve the program. If you wanted to fully understand how your program works, you could organize data in the chronological order in which clients go through your program. If you are conducting an outcomes-based evaluation, you can categorize data according to the indicators for each outcome.

KEY CONSIDERATIONS IN PROGRAM EVALUATION

Consider the following key questions when designing a program evaluation:

1. For what purposes is the evaluation being done, i.e., what do you want to be able to decide as a result of the evaluation?
2. Who are the audiences for the information from the evaluation, i.e., customers, bankers, funders, board, management, staff, customers, clients, etc?
3. What kinds of information are needed to make the decision you need to make and/or enlighten your intended audiences, i.e., information to really understand the process of the product or program (its inputs, activities and outputs), the customers or clients who experience the product or program, strengths and weaknesses of the product or program, benefits to customers or clients (outcomes), how the product or program failed and why, etc?
4. From what sources should the information be collected, i.e., employees, customers, clients, groups of customers or clients and employees together, program documentation, etc?
5. How can that information be collected in a reasonable fashion, i.e., questionnaires, interviews, examining documentation, observing customers or employees, conducting focus groups among customers or employees, etc?
6. When is the information needed (so, by when must it be collected)?
7. What resources are available to collect the information?

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SOME MAJOR TYPES OF PROGRAM EVALUATION

When designing your evaluation approach, it may be helpful to review the following three types of evaluations, which are rather common in organizations.

Note: Do not design your evaluation approach simply by choosing which of the following three types you will use. Design your evaluation approach by carefully addressing the key considerations on the previous page.

GOALS-BASED EVALUATION

Typically programs are established to meet specific goals. Goal-based evaluations are evaluating the extent to which programs are meeting predetermined goals or objectives.

Questions to ask when designing an evaluation to see if you reached your goals, are:

1. How were the program goals (and objectives, is applicable) established? Was the process effective?
2. What is the status of the program's progress toward achieving the goals?
3. Will the goals be achieved according to the timelines specified in the program implementation or operations plan? If not, then why?
4. Do personnel have adequate resources (money, equipment, facilities, training, etc.) to achieve the goals?
5. How should priorities be changed to put more focus on achieving the goals? (Depending on the context, this question might be viewed as a program management decision, more than an evaluation question.)
6. How should timelines be changed (be careful about making these changes - know why efforts are behind schedule before timelines are changed)?
7. How should goals be changed (be careful about making these changes - know why efforts are not achieving the goals before changing the goals)? Should any goals be added or removed? Why?
8. How should goals be established in the future?

PROCESS-BASED EVALUATION

Process-based evaluations are geared to fully understanding how a program works -- how does it produce that results that it does. These evaluations are useful if programs are long-standing and have changed over the years, there appear to be large inefficiencies in delivering program services and for accurately portraying to outside parties how a program truly operates.

Questions to ask when designing an evaluation to closely examine the processes in your programs, are:

1. On what basis do staff and/or the clients decide that products or services are needed?
2. What is required of staff in order to deliver the product or services?
3. How are staff trained about how to deliver the product or services?
4. How do clients come into the program?
5. What is required of clients?
6. How do staff select which products or services will be provided to the clients?
7. What is the general process that clients go through with the product or program?
8. What do clients and/or staff consider to be strengths of the program?
9. What typical complaints are heard from staff and/or clients?
10. What do staff and/or clients recommend to improve the product or program?
11. On what basis do the clients decide that the product or services are no longer needed?

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SOME MAJOR TYPES OF PROGRAM EVALUATION

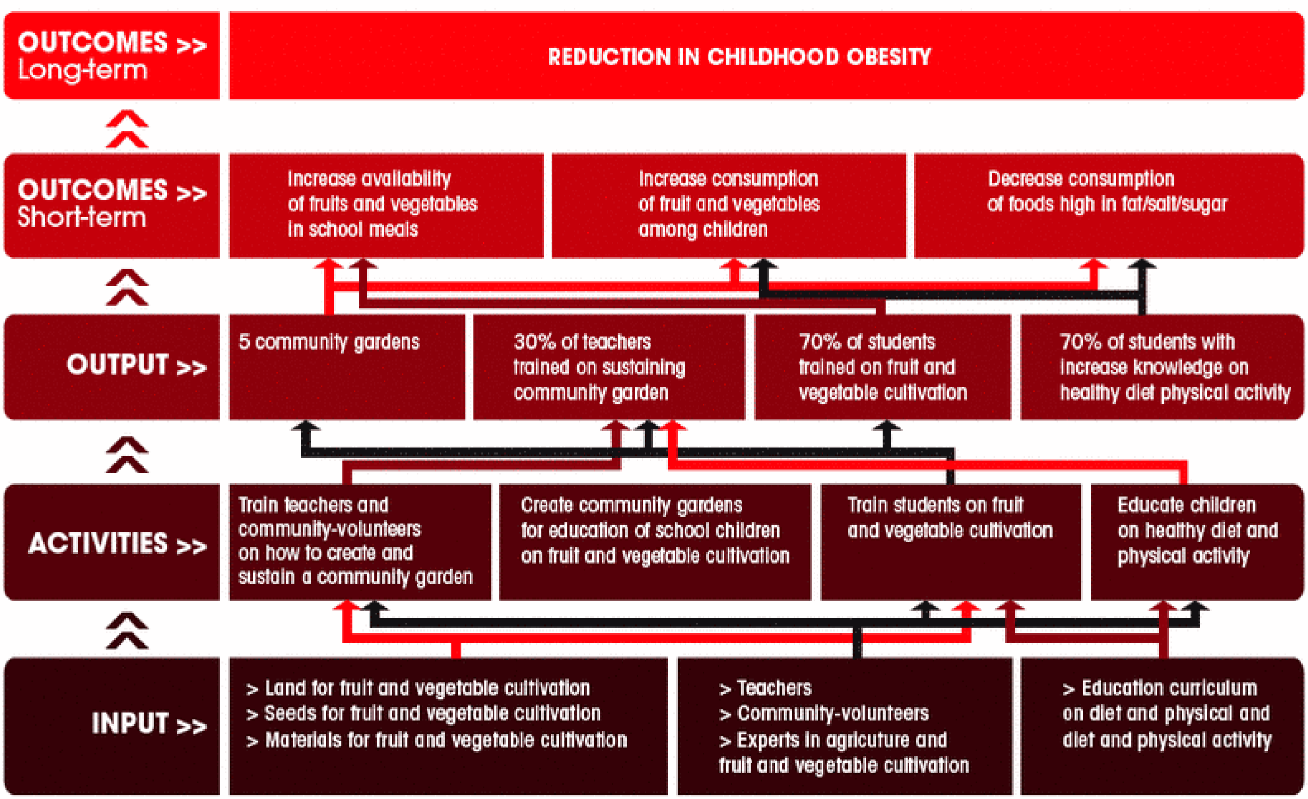
OUTCOMES-BASED EVALUATION

In an outcomes evaluation, you ask whether you met your objectives and outcomes. Outcomes are the benefits to clients from participation in the program. Outcomes are usually in terms of enhanced learning (knowledge, perceptions/attitudes or skills) or conditions, e.g., increased literacy, self-reliance, etc.

The general steps to accomplish an outcomes-based evaluation include:

1. Identify the major outcomes that you want to examine and reflect on your mission.
2. Prioritize those outcomes.
3. For each outcome - specify what observable measures or 'indicators' suggest that you are achieving that key outcome with your clients.
4. Specify a "target" goal of clients, i.e., what number or percent of clients you commit to achieving specific outcomes with.
5. Identify what information is needed to show these indicators.
6. Decide how that information can be efficiently and realistically gathered. Consider program documentation, observation of program staff and clients in the program, development of client questionnaires and interviews, case studies of program failures and successes, etc.
7. Analyze and report the findings.

Note: Outcomes-Based evaluation typically involves the use of a Program Logic Model. – See sample Program Logic Model below from the World Heart Federation.



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METHODS TO COLLECT INFORMATION

	OVERALL PURPOSE	ADVANTAGES	CHALLENGES
QUESTIONNAIRES, SURVEYS, AND CHECKLISTS	Get information from people in a non-threatening way	• complete anonymously • inexpensive to administer • easy to compare and analyze • administer to many people • can get lots of data • many sample questionnaires already exist	• might not get careful feedback • wording can bias client's responses • impersonal • in surveys, may need sampling expert • doesn't get full story • percentage of return surveys can vary
INTERVIEWS	Understand someone's impressions or experiences and/or learn more about their answers to questionnaires	• full range and depth of information • develops relationship with client • flexible with client's schedule	• take time to plan and execute • hard to analyze and compare • interviewer can bias client's responses
DOCUMENT REVIEW	Create an impression of how a program operates without interrupting the program; information collected is from review of applications, finances, memos, minutes, etc.	• collection of comprehensive and historical information • doesn't interrupt program or client's routine in program • information already exists • few biases about information	• often takes a lot of time • information may be incomplete • clarity needs to be established about what you are looking for • data restricted to what already exists
OBSERVATION	Gather accurate information about how a program actually operates - particularly about processes	• view operations of a program as they are actually occurring • adapt to events as they occur	• difficult to interpret seen behaviors • complex to categorize observations • influence behaviors of program participants
FOCUS GROUPS	Explore a topic in depth through group discussion. Allows for a space to reflect, assess reactions to an experience, provide suggestions, and concerns.	• quickly and reliably get common impressions • efficient way to get depth of information in a short time • convey key information about programs	• hard to analyze responses quantitatively • a good facilitator is needed for safety and closure • difficult to schedule 8-10 people together
CASE STUDIES	Understand client's experiences in a program, and conduct a comprehensive examination through cross comparison of cases	• fully depicts client's experience in program • powerful means to portray program to outsiders	• usually quite time consuming to collect, organize and describe • represents depth of information, rather than breadth

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INTERACTIVE EXERCISE: DESIGN AN EVALUATION PROCESS

Select one program from one of the organizations seated at your table. Begin designing an evaluation process for that program by answering the questions below.

What program are you evaluating?

What is the purpose of the evaluation? ***(i.e. Who will use the evaluation? How will they use the information? See "Why evaluate your programs?" Handout)***

What type of program evaluation will you use and why? ***(See "Some Major Types of Program Evaluation" Handout)***

What questions will the evaluation seek to answer? ***(See "Some Major Types of Program Evaluation" Handout)***

What method(s) will you use to collect information and why? ***(See "Methods to Collect Information" Handout)***

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