Acknowledgement

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Book layout by Marinda Scott Design
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Introduction

Based on years working with the social sector—large and small not-for-profits and government agencies—we have learned a great deal about evaluating performance and program outcomes. We created this guide and are sharing it with you because of our belief that—according to the Chinese proverb—“give a man a fish, and you feed him for a day, but teach a man to fish, and you feed him for a lifetime.” Our hope is that in distributing this workbook, we can empower you to be self-sufficient when conducting program evaluations and implementing performance outcomes in your organization.

Purpose

The content of this guide is designed to:

1. **Work within your organization’s unique culture.** Any organization can do evaluation; it is a matter of recognizing the things your company already has in place to support the process.

2. **Emphasize the continuous quality improvement (CQI) process.** The journey is more important than the destination; the goal is to continuously improve the quality of your organization’s processes.

3. **Give you take-away tools.** From assessing your evaluation readiness to analyzing your programs and measuring their outcomes, the practical tools in this workbook will make implementing evaluation a reality in your agency.

4. **Provide you with reporting and tracking strategies.** Reporting tips and simple tracking tables will show you how to move your evaluation to the next level.

5. **Be interactive.** When you see the cartoon figure, Mr. PACE use the space provided to take notes and apply the learning to your workplace.

Expected Learning Outcomes

After reading and completing this workbook, you will be able to:

1. **Understand broader organization systems and the context for evaluation.** Evaluation doesn’t happen in a vacuum; it’s a part of a larger quality approach.

2. **Write meaningful evaluation questions** and determine the evaluation method that works best for your program goals.

3. **Develop a practical data collection plan** that fits within the tools you currently use.

4. **Create a logic model** or visual snapshot of your program.

5. **Share your evaluation results** with others.

6. **Leverage program outcomes** to improve organizational performance and create greater value within your organization.

What would you like to learn about program evaluation? What information do you hope to take away? What are your learning objectives? Use the space below to answer these questions and create your learning plan before you proceed.
Evaluation as a Process

Program evaluation is a critical process that feeds many different areas within the organization. It contributes to a systems perspective, a holistic approach to leveraging the planning, processes, people, and performance in your organization to effectively empower staff to deliver high value services (Figure A).

Evaluation feeds into larger organizational systems by promoting strategic management. As you can see in Figure B, evaluation contributes to organizational activities while these areas also contribute to evaluation.

Strategic management is the systematic analysis of external organizational factors—such as clients, stakeholders, and competitors—and the internal environment—employees, organizational systems, and processes—to achieve better alignment of organizational policies and procedures with strategic priorities. Effective strategic management requires the proper distribution of organizational resources to different business goals according to strategic objectives.

Examples of strategic management include:
• Providing employees with the resources they need to do their jobs
• Training employees in business-critical skills
• Capturing valid and reliable process and data documentation
• Evaluating programs to ensure effectiveness and efficiency

Evaluation is a powerful driver to establish a culture of data-driven decision-making across broader organizational systems. It is amazing how often decisions are made without data to guide better understanding of problems and available options. As part of this process you will learn how to ensure program planning and program improvements are based on solid evaluation data. Our goal is to help you learn how to integrate the data you collect into your strategic management systems.
Why Evaluate Your Program?

Programs need a mechanism to periodically evaluate their performance. Ongoing continuous quality improvement (CQI) is the mission of any program. Something created once may sustain itself, but it will not grow and continually meet the needs of program participants unless it is evaluated and improved. Needs and resources change, and stakeholders are more interested in funding programs that show a track record of success.

Program evaluation:
• Answers the question, how are we doing?
• Answers the question, what could we do better?
• Assesses how well you are using program resources (efficiency)
• Assesses the impact of the program on the community (effectiveness)
• Justifies the existence of your program
• Supports the argument for increased resources (for budget, staffing, etc.)
• Highlights the impact of your program on the community in terms of strong outcomes
• Ensures that an organization’s programs are focused on CQI

Which of these purposes do you hope program evaluation will fulfill in your organization?
What is Evaluation?

Evaluation is a process used to review, assess, and analyze the workings of a program or its components.

Evaluation has three components:
1. Evaluation is an in-depth look at a program based on focused evaluation questions:
   - What is the impact of my program?
   - What are the strengths my program can harness?
   - What challenges does my program need to overcome?
   - How do I manage my program more effectively?
   - Is my program running as intended?
   - Do program goals align with the outcomes that are being accomplished?
   - What tangible proof do I have that my program is successful?

2. Program evaluation answers the evaluation questions by collecting data using specific methodologies:
   - Surveys/Questionnaires
   - Checklists
   - Interviews
   - Document reviews
   - Case studies
   - Focus groups

3. Evaluation provides tools to:
   - Manage the program
   - Identify performance gaps
   - Develop implementation plans
   - Create stakeholder feedback reports

*Evaluation is NOT
   - Prescriptive
   - Linear
   (even though it contains specific steps)
While program evaluation is not linear, it is cyclical, because it supports a CQI approach. Below is a cycle of program evaluation, which captures the pre-planning, implementation, and reporting stages of evaluation.

1. Assess your readiness.
2. Start with the end in mind by identifying clear program outcomes.
3. Develop a data collection plan: Choose data gathering methods that support your program’s needs.
4. Identify resources.
5. Determine program outcomes.
6. Review and analyze data.
7. Create a logic model.
8. Track and use outcome and evaluation results to inform strategic management.
9. Integrate results into strategic program planning.

**Figure C: The Program Evaluation Cycle**
Program Evaluation Versus Outcome Measurement and Program Planning

Program evaluation and outcome measurement are not one and the same. Likewise, program evaluation is different from program planning. Below are some basic differences between the three processes:

<table>
<thead>
<tr>
<th>PROGRAM PLANNING</th>
<th>PROGRAM EVALUATION</th>
<th>OUTCOME MEASUREMENT</th>
</tr>
</thead>
<tbody>
<tr>
<td>Precedes program evaluation (can’t evaluate a program until you plan it)</td>
<td>Takes place after program planning: purpose is to evaluate that which planning has produced</td>
<td>Specific component of program evaluation</td>
</tr>
<tr>
<td>One-time process that occurs in the early stages of strategic planning</td>
<td>Cyclical, ongoing process focused on continuous quality improvement</td>
<td>Focuses evaluation specifically on program results, or the program’s impacts on stakeholders</td>
</tr>
</tbody>
</table>

An example of PROGRAM PLANNING in your organization:

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________

An example of PROGRAM EVALUATION in your organization:

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________

An example of OUTCOME MEASUREMENTS in your organization:

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
Pre-Planning for Evaluation

**Step 1: Assess your readiness**
Before you evaluate, perform a gap analysis to compare your program’s actual performance with its potential performance. A gap analysis asks, “Where are we now?” and “Where do we want to be?”

*Below, assess your organization’s systems to determine how they perform now. Are you ready to move into evaluation?*

<table>
<thead>
<tr>
<th>On a scale of 1 to 5 (with 1 being low and 5 being high) how would you rank:</th>
<th>Readiness 1–5 Scale</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>PLANNING</strong></td>
<td>The quality of your program planning/design?</td>
</tr>
<tr>
<td></td>
<td>The reliability of non-staff resources (funding sources, equipment, buildings, etc)?</td>
</tr>
<tr>
<td></td>
<td>The commitment and longevity of your staff?</td>
</tr>
<tr>
<td><strong>PROCESS</strong></td>
<td>The extent to which the program seeks to emulate/benchmark itself against best-in-class business practices?</td>
</tr>
<tr>
<td></td>
<td>The extent to which staff training is a priority in the program?</td>
</tr>
<tr>
<td></td>
<td>The extent to which continuous quality improvement is integral to the culture of your program?</td>
</tr>
<tr>
<td><strong>PEOPLE</strong></td>
<td>The extent to which staff can articulate the purpose of the program and the program’s activities?</td>
</tr>
<tr>
<td></td>
<td>The extent to which staff can articulate the results or outcomes the program has on the clients?</td>
</tr>
<tr>
<td><strong>PERFORMANCE</strong></td>
<td>The extent to which client-based data is collected?</td>
</tr>
<tr>
<td></td>
<td>The extent to which data collected is used in making decisions and managing the program?</td>
</tr>
</tbody>
</table>

Add your score

Multiply by 2

---

*Evaluating Performance Outcomes: A Guide to Implementing Program Evaluations*
Step 2: Start With the End in Mind

There are several different types of program evaluation. We are going to focus on three: goal-based, process-based, and outcome-based. Your answers to the evaluation questions below will help to determine which evaluation method will work best for your purposes and the specific end results you aim to accomplish.

**Whom is this program affecting? Whom do you want the program to benefit? Identify your program’s stakeholders below:**

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________


**What results do you want this program to produce? What questions do you want answered? Identify your desired evaluation results below:**

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________


**Goal-based evaluation:**
An evaluation conducted to determine how well or to what extent a program is meeting its predetermined goals as established during program planning.

**Goal-based evaluation is beneficial when:**
• You are entering a new phase of program planning
• You are required to provide periodic program progress reports

**Questions a goal-based evaluation might address:**
• What is the program’s current status in regard to meeting its goals?
• Are resources allocated appropriately to ensure goals are met?

**Below, brainstorm five questions a goal-based evaluation of your program may answer:**

1.

2.

3.

4.

5.
Process-based evaluation:
An evaluation that determines how a program operates and achieves its results.

Process-based evaluation is beneficial when:
• Long-standing programs have experienced recent or ongoing change
• Programs appear to contain major inefficiencies
• Programs need to be illustrated to external audiences

Questions a process-based evaluation might address:
• How do we replicate this program?
• What does the “life-cycle” of this program look like (from beginning to end)?

Brainstorm five questions that your program’s process-based evaluation might answer:
1. 
2. 
3. 
4. 
5.

Outcome-based evaluation:
An evaluation that determines to what extent your program is delivering the outcomes it is designed to achieve.

Outcome-based evaluations are beneficial when:
• You need to justify the existence of your program to external stakeholders
• You want to track the performance of your program over time

Questions an outcomes-based evaluation might address:
• What indicators best measure to what extent my program is meeting its intended outcomes?
• How effectively is my program meeting its desired outcomes?

Now, brainstorm five questions your program’s outcome-based evaluation might answer:
1. 
2. 
3. 
4. 
5.
Now it is time to identify the purpose of your evaluation.

Reiterate the program’s need: Why does the program exist? Identify the program’s:
• need statement/mission
• outcomes
• geographic market location
• target population
• baseline data to monitor change in population over time
• justification (how do you know your program need is “real”?)

To help you answer the above questions, take some time to do the following:
• Identify key program stakeholders
• Examine any program data currently available
• Contact state and local agencies (if appropriate)
• Review industry research and organizational data.

Use the following evaluation questions as guidelines to help you identify your purpose. The questions are organized according to the type of evaluation you are implementing:

**GOAL-BASED**

What are the characteristics, needs, and priorities of the target population?

________________________________________________________________________

What are potential program barriers?

________________________________________________________________________

What is most important to do to meet the program goals?

________________________________________________________________________

Create your own evaluation question

________________________________________________________________________
### PROCESS-BASED
How is the program implemented?

| __________________________________________________________________________ |
| __________________________________________________________________________ |
| __________________________________________________________________________ |

Are activities delivered as intended?

| __________________________________________________________________________ |
| __________________________________________________________________________ |
| __________________________________________________________________________ |

Are participants being reached as intended?

| __________________________________________________________________________ |
| __________________________________________________________________________ |
| __________________________________________________________________________ |

Create your own evaluation question

| __________________________________________________________________________ |
| __________________________________________________________________________ |
| __________________________________________________________________________ |

### OUTCOME-BASED
To what extent are desired changes occurring?

| __________________________________________________________________________ |
| __________________________________________________________________________ |
| __________________________________________________________________________ |

Who is benefitting/not benefitting?

| __________________________________________________________________________ |
| __________________________________________________________________________ |
| __________________________________________________________________________ |

What seems to work/not work?

| __________________________________________________________________________ |
| __________________________________________________________________________ |
| __________________________________________________________________________ |

Create your own evaluation question

| __________________________________________________________________________ |
| __________________________________________________________________________ |
| __________________________________________________________________________ |
Launch Your Evaluation

Now it is time to conduct your evaluation.

Step 1: Develop a Data Collection Plan

The next step is to develop a data collection and management plan.

- Get people invested by explaining what you will do with the data
- Invite others (such as government agencies, sister organizations, and community forums) to participate
- Focus on both formal and informal communication channels
- Offer to share your findings to promote buy-in

Gather both qualitative and quantitative data. This provides a richer, well-rounded picture of your program.

Figure D: Qualitative vs. Quantitative Data

<table>
<thead>
<tr>
<th>Qualitative Data</th>
<th>Quantitative Data</th>
</tr>
</thead>
<tbody>
<tr>
<td>Deals with descriptions</td>
<td>Deals with numbers and definitions</td>
</tr>
<tr>
<td>Data can be observed</td>
<td>Data can be measured</td>
</tr>
<tr>
<td>“Soft” data</td>
<td>“Hard” Data</td>
</tr>
</tbody>
</table>

Qualitative data-gathering methodologies

- Observation
- Surveys with open-ended questions (such as opinion questions)
- Interviews
- Focus groups
- Case studies

Quantitative data-gathering methodologies

- Surveys with close-ended questions (such as true/false and multiple choice)
- Checklists
- Organizational statistics
- Documentation
## Benefits and Challenges of Data Collection Methodologies

<table>
<thead>
<tr>
<th>METHODOLOGY</th>
<th>BENEFITS</th>
<th>CHALLENGES</th>
</tr>
</thead>
</table>
| Observation: viewing and noting a fact or occurrence | • Provides detailed data  
• Reliable because data collection is occurring “live” | • Observer bias may occur  
• Confidentiality or privacy issues may arise |
| Written survey: a sampling of facts or opinions used to indicate those of a complete collection or larger unit | • Anonymous  
• Inexpensive to administer  
• Can reach a broad audience | • Impersonal  
• May need statistical program/expert to analyze results  
• Participants may misunderstand questions |
| Checklist: a list of items used for comparison or verification | • Inexpensive to administer  
• Unbiased | • Impersonal  
• Data may be incomplete or vague  
• Confined to existing data |
| One-on-one interview: one person questions, consults or evaluates another from whom information is sought | • Allows for personal connection  
• Inexpensive to administer  
• Provides thorough data | • Time consuming  
• Limited audience  
• Difficult to compare with other data |
| Focus group: a representative group of people questioned together about their opinions on a particular subject | • Time efficient  
• Collects thorough, varied feedback | • Difficult to administer (requires facilitation)  
• Difficult to compare data |
| Case study: study of a unit (such as a person or group) in order to compare to a larger group | • Proved insight into program as a whole  
• Garners excellent descriptive data | • Time consuming  
• Lacks breadth of data |
| Documentation review: study of documents to substantiate a claim | • Allows examination of data over time  
• Unbiased  
• Inexpensive | • Time consuming  
• Data may be incomplete or vague  
• Confined to existing data |
Checklist for Selecting Data Collection Methods*
This checklist can help you decide which data collection methods are most appropriate for your outcome measurement.

### Surveys
1. Do I need data from the perspective of the participants, client, beneficiary, or customer? **YES** **NO**
2. Do I have a way to get it from these individuals in a systematic way? **YES** **NO**
3. Do I need data that are standardized so that statistical comparisons can be made? **YES** **NO**
   (For example, will I need to report percent’s or other statistics?)
4. Will participants be able to understand the survey questions? **YES** **NO**
   (Consider age, cultural backgrounds, etc.)
5. Do participants have the necessary knowledge or awareness to accurately answer questions about the outcomes? **YES** **NO**

*If you answered Yes to questions 1 through 5, surveys may be appropriate for collecting data on your outcomes and indicators.*

### Interviews
6. Are more in-depth answers necessary to adequately measure the indicators or to get information on what is needed or what should change? **YES** **NO**
7. Will it be necessary for someone to personally ask participants questions (either on the phone or in person) in order to collect the information related to this outcome? **YES** **NO**
   (Consider age, cultural background, as well as state of mind or receptivity of participants.)

*If you answered Yes to questions 6 through 7, interviews may be appropriate for collecting data on your outcomes and indicators.*

---

Use the Checklist for Selecting Data Collection Methods and the information from Benefits and Challenges of Data Collection Methodologies on the previous pages to determine what your data collection plan will be. Use the space below to draft a preliminary data plan. Based on your evaluation questions, what data do you need to gather, and what qualitative and quantitative methods will you use to get it?

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Step 2: Identify Resources

Identify the relationship between the things you want to do and the resources required to do them.

Refer back to the gap analysis you conducted. Does your organization have access to the resources you plan to use and can it support the program activities you plan to implement?

- Who needs this program?

- Why do they need this program?

- What activities must this program include to meet these needs?

- What resources must we acquire to support these activities?

- Do we have all of these resources on-hand?

- If no, what activities will we forego in order to use our resources more effectively? Or, what new resources will be seek/acquire in order to effectively implement all of the activities?
Step 3: Determine Program Outcomes—What are your program’s objectives?

Program outcomes are often confused with outputs, but the two are distinctly different.

*Figure E: Outcomes vs. Outputs*

<table>
<thead>
<tr>
<th>OUTCOMES</th>
<th>OUTPUTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Indicate program effectiveness</td>
<td>Indicate program efficiency</td>
</tr>
<tr>
<td>Change in knowledge, skills, attitude or behavior</td>
<td>Program units of service produced</td>
</tr>
<tr>
<td>Stakeholders’ experiences/benefits as a result of the program</td>
<td>Tangible value produced as a result of the program</td>
</tr>
<tr>
<td>Examples: skills gained from attending a training class, changes in participant behavior, changes in attitude</td>
<td>Example: number of people who attended a training class, number of classes held, number of volunteers hours served</td>
</tr>
</tbody>
</table>

*Practice makes perfect: Identify five tangible outputs that add inherent value to your program participants:*

1. 
2. 
3. 
4. 
5. 

Outcomes show a change in knowledge, skills, attitude, or behavior.

- **Knowledge:** what people know about a topic
- **Skill:** the development of new skill sets or the improvement of skill sets over time
- **Attitude:** how people feel about a topic
- **Behavior:** change in participants’ behavior or actions due to re-education or training.
To help identify your program’s outcomes, ask yourself:

1. What are you trying to accomplish?
2. What are the ultimate desired results?
3. In what way(s) would you like a person to change or a condition to change as a result of your program?
4. What is the ultimate benefit to being a participant in your program? Why do people participate in your program?

Tips on creating outcomes:

1. Create realistic outcomes
2. Create specific outcomes
3. Create unique outcomes
4. Create short outcomes
5. Pilot test all outcomes

It’s finally time to introduce you to Mr. PACE!
Use Mr. PACE as a mnemonic to help you to create learning outcomes anytime, anywhere:

% (and #) of People (who) + will + Action verb (change in behavior, skill, knowledge, or attitude) + Change (by how much) + Extent/time (when)

**PACE**  People (who), Action (what), Change (how much), Extent (when)

Example: 100 percent (the total number) of participants who attend my training course (who) will learn (action) three new ideas about program evaluation (how much) after completing this course (when).

Now it’s your turn! Create your own example (with help from Mr. PACE) of a possible outcome for your program.

PEOPLE:

ACTION:

CHANGE:

EXTENT:

*Remember, we track outcomes to:
- Our work is having the desired impact on the people served
- Ensure the program is achieving maximum efficiency, effectiveness, and quality of service
- To ensure accountability to stakeholders and funding sources
- To aid in the dissemination of knowledge so others can benefit from our experience.
A Community Vocational Rehabilitation Program Case Study

A small community not-for-profit organization implements a vocational rehabilitation program that employs adults with disabilities. This program fulfills a certain need that adults with disabilities in the community have: the need to regularly engage in meaningful work. The program is run by the organization’s full- and part-time staff, as well as several volunteers. Approximately 50 individuals with disabilities participate in the program. Most of the participants receive funding from local community service boards and from the federal government, through Medicare and Medicaid waivers. Several individuals are privately or self-funded.

The program takes place Monday through Friday during daytime business hours. Program participants work in small groups within local businesses for approximately four hours a day with the supervision of a staff person who fills an oversight and coaching role. Participants receive regular paychecks from the not-for-profit organization. The organization also provides participants with ongoing training to develop their job skills and professional competencies.

The program is evaluated on an ongoing basis by the not-for-profit staff using a process-based evaluation method. The program’s goals are determined during annual strategic planning, and employees create program outcomes, which they measure on a monthly, quarterly, and annual basis. Most outcomes are developed from program goals, and several are required by regulatory agencies that provide funding and program oversight.

Program goals include: greater participant inclusion within the local community and broader society; increased participant job and social skills; and increased participant satisfaction.

Using the information above, test your skills: Which of the following are outputs, and which are outcomes? Mark outputs as OP and outcomes as OC.

1. Average monthly attendance ________
2. Percent of regulatory program goals met ________
3. Decrease in negative on-the-job incidents ________
4. Increase in participants’ hours worked ________
5. Increase in participants’ skills learned on the job ________
6. Increase in participants’ hourly wages ________
7. Number of new program applications received ________
8. Hours participants spent in job skills training ________
Step 4: Review and Analyze Your Data

You collected data in order to answer the original evaluation questions, so be sure to revisit those questions before conducting your analysis.

- For quantitative data, perform various statistical calculations such as ranking, mode, mean, median, and so forth.
- For qualitative data, group comments into categories and themes, highlighting program strengths and areas for improvement.

Keep the following tips in mind when conducting analysis:

- Archival data has a long lag time, so when faced with conflicting information between historic data and more subjective data (like from a focus group) lean toward the more current data.
- Be sure to ask a lot of “why” questions; data points are not always related.
- Beware of numbers taken out of context. Make sure that you don’t draw erroneous conclusions based upon “cherry-picked” data results.
- Be careful when dealing with comparisons. Remember that a correlation in data does not equate causation.

Data Analysis Software

Let’s face it, we’re not all statisticians; we need help! Data analysis software programs range from simple and general to complex and specialized. Below are several options to help make your data analysis process easier:

1. Spreadsheet software: Programs like Microsoft Excel are capable of most basic analytical functions, which may be all you need.
   - Additional applications allow Excel to perform more complex analytical procedures. These, such as XLSTAT ([http://www.xlstat.com/](http://www.xlstat.com/)), can be purchased online and downloaded.

2. Quantitative data analysis: For more advanced quantitative analysis, a statistical software package might be the choice for you. The products below are widely used by researchers and universities. They provide services such as data collecting, deployment, modeling, and statistics.
   - SPSS: [http://www.spss.com](http://www.spss.com)

3. Qualitative data analysis: Many qualitative software programs can analyze large bodies of textual, graphical, audio, and video data. The following website from the American Evaluation Association provides a compilation of some of these resources: [http://www.eval.org/Resources/QDA.htm](http://www.eval.org/Resources/QDA.htm)

What software program(s) do you intend to use to perform your data analysis?
Step 5: Create A Logic Model

A logic model is a systematic and visual way of presenting relationships between the:

- need for a program’s existence
- resources allocated to meet the need
- day-to-day activities that make up the work of the program
- program outputs (effectiveness metrics)
- program outcomes (efficiency metrics)

A logic model implies an “if-then relationship” between each of the areas above. It connects the program need to inputs and activities to outputs and outcomes.

For example:
If a community not-for-profit needs to learn how to implement program evaluation (need)...

...then a group of 25 employees from this organization + a training facilitator + a workbook (inputs)...

...and teaching + discussion + writing in the workbook (activities)...

...will create three hours spent in training + 25 completed workbooks (outputs)...

...and an increase in participant knowledge about program evaluation + an impartation of knowledge in participants’ organizations (outcomes).

Figure F: Elements of a Logic Model
The elements of a logic model include:

If Then...if Then...if Then...if Then

<table>
<thead>
<tr>
<th>NEEDS</th>
<th>INPUTS</th>
<th>ACTIVITIES</th>
<th>OUTPUTS</th>
<th>OUTCOMES</th>
</tr>
</thead>
<tbody>
<tr>
<td>The problem statement</td>
<td>The resources available to your program to address your needs</td>
<td>The day-to-day work that happens with the inputs to directly meet the needs for the program</td>
<td>The direct product of the program’s activity</td>
<td>The benefits that occur as a direct result of your program</td>
</tr>
<tr>
<td>The reason a program exists</td>
<td>Examples: staff, money, materials, equipment, physical location</td>
<td>An assessment of what you do and how you do it</td>
<td>The volume of work accomplished</td>
<td>Changes or improvements in skill, knowledge, attitude, or behavior</td>
</tr>
<tr>
<td>The need your program fulfills</td>
<td></td>
<td></td>
<td>These metrics have little direct value to the program’s participants, but are valuable metrics to program staff, because they track the efficiency of the program (use of inputs to conduct activities)</td>
<td>Metrics that show the difference your program makes in the lives of its participants.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Include:</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>• Short-term (the first changes that occur for an individual, group, or organization as a result of a program)</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>• Intermediate (the subsequent benefits for people during or after the program)</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>• Long-term (the eventual impact for which the program is accountable)</td>
</tr>
</tbody>
</table>
The logic model below shows a snapshot of an annual networking and training conference attended by a group of human service not-for-profit employees.

<table>
<thead>
<tr>
<th>NEEDS</th>
<th>INPUTS</th>
<th>ACTIVITIES</th>
<th>OUTPUTS</th>
<th>OUTCOMES</th>
</tr>
</thead>
<tbody>
<tr>
<td>Information</td>
<td>Speakers</td>
<td>Workshops</td>
<td>Continuing education credits earned</td>
<td>Short-term</td>
</tr>
<tr>
<td>Networking</td>
<td>Organizers</td>
<td>Displays</td>
<td>Surveys completed</td>
<td>Attendees’ satisfaction</td>
</tr>
<tr>
<td>Communication</td>
<td>Attendees</td>
<td>Networking</td>
<td>Materials distributed</td>
<td>Relationships developed</td>
</tr>
<tr>
<td>Collaboration</td>
<td>Vendors</td>
<td>Eating and drinking</td>
<td>Number of new attendees</td>
<td>New knowledge learned</td>
</tr>
<tr>
<td>Training</td>
<td>Donations</td>
<td>Recognition and awards</td>
<td>Number of repeat attendees</td>
<td>Intermediate</td>
</tr>
<tr>
<td>Fundraising</td>
<td>Food</td>
<td>ceremony</td>
<td>Number of sessions attended</td>
<td>Creating organizational buy-in</td>
</tr>
<tr>
<td>Mini vacation</td>
<td>Vendors</td>
<td></td>
<td></td>
<td>Maintaining new relationships</td>
</tr>
<tr>
<td>Raising</td>
<td>Trainers</td>
<td>Raffles</td>
<td></td>
<td>Successful application of new knowledge on- the-job</td>
</tr>
<tr>
<td>awareness</td>
<td>Presentation</td>
<td></td>
<td></td>
<td>Long-term</td>
</tr>
<tr>
<td>of client/staff</td>
<td>materials</td>
<td></td>
<td></td>
<td>Increasing quality of organizations’ programs and services</td>
</tr>
<tr>
<td>needs</td>
<td></td>
<td></td>
<td></td>
<td>Increasing quality of conference for years to come</td>
</tr>
<tr>
<td>Continuing</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>education units</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fresh ideas</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Now build your own logic model using the template below:

| Needs | Inputs | Activities | Outputs | Short Term Outcomes | Intermediate Outcomes | Long-Term Outcomes |
Step 6: Track Your Outcomes

The final step in your evaluation launch is to track program outcomes.

Outcomes metrics track the
• efficiency of the program (best use of resources)
• effectiveness of the program (impact on participants)

An outcomes measurement scorecard provides a succinct and standardized way to keep track of program outcomes and mark progress over time. It also allows for easy reporting.

An outcomes measurement scorecard consists of
• Outcome statement
• Indicator: measures specific data that track a program’s success on outcomes by describing observable, measurable characteristics or changes that represent achievement of an outcome.
• Target (the number that the outcome is aiming to reach)

Example:
• Outcome: We want this program to result in increased participant satisfaction
• Indicator: Percentage of total participant satisfaction, based on written satisfaction surveys
• Target: 100 percent participant satisfaction

Create your own outcome measures below. Brainstorm two indicators and targets for each outcome statement

<table>
<thead>
<tr>
<th>OUTCOME STATEMENT</th>
<th>OUTCOME STATEMENT</th>
<th>OUTCOME STATEMENT</th>
</tr>
</thead>
<tbody>
<tr>
<td>Indicator</td>
<td>Target</td>
<td>Indicator</td>
</tr>
<tr>
<td>Indicator</td>
<td>Target</td>
<td>Indicator</td>
</tr>
<tr>
<td>Indicator</td>
<td>Target</td>
<td>Indicator</td>
</tr>
</tbody>
</table>
Using Evaluation

We have reached the end of the program evaluation cycle. Now it’s time to use your evaluation results to inform your strategic management process.

Planning
You didn’t complete all of this work to simply hang a pretty logic model of your program or admire your brilliantly devised outcomes. Rather, evaluation is intended for action.

• **Process planning** starts with results (outputs and outcomes) and requires working backwards to identify the processes needed to produce those results.

• **Action planning** generates a plan for who is going to do what, by when, and in what order for an organization to meet its strategic goals.

Both processes are designed with program improvement as the end goal and should be tied directly into the organization’s broader strategic goals. Such planning should take place on a higher level within the organization as part of your organization’s overall strategic planning process.

*Remember, program evaluation is not intended to stand alone, but to inform the strategic management of your organization.*

Below is an example of a planning template. Use the empty space to create your own example of an action planning item.

<table>
<thead>
<tr>
<th>GOAL</th>
<th>OBJECTIVE</th>
<th>ACTIONS</th>
<th>RESPONSIBILITY</th>
<th>TIMELINE</th>
</tr>
</thead>
</table>
| Increase training class attendance numbers | Build local organizations’ awareness of training | 1. Send email blasts  
2. Advertise on local message boards  
3. Attend community networking event and share by word-of-mouth | Jane Doe and her marketing staff of five | December 31, 2010 |

After you have developed an action plan for each of your program’s major goals, it is imperative to assign specific people to be responsible for the completion of these action items, and to hold them accountable to these tasks.
**Figure H: Accountability Matrix**

This accountability matrix focuses in detail on the second half of the action planning table in Figure 5-A:

<table>
<thead>
<tr>
<th>ACTION:</th>
<th>WHO IS RESPONSIBLE:</th>
<th>TIMELINE FOR COMPLETION:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Attend networking event and share with others about training opportunities</td>
<td>Jane Doe and her marketing staff of five</td>
<td>December 31, 2012</td>
</tr>
<tr>
<td>Phase #1 Research local networking events, present options to team, and choose one to attend</td>
<td>Staff person A</td>
<td>September 30, 2012</td>
</tr>
<tr>
<td>Phase #2 Attend networking event and give business card and verbal invitation to next training event to at least five people</td>
<td>Staff persons B, C, D, and E</td>
<td>November 30, 2012</td>
</tr>
<tr>
<td>Phase #3 Follow up with connections made via phone or email</td>
<td>Staff person B, C, D, and E</td>
<td>December 31, 2012</td>
</tr>
</tbody>
</table>

Now it’s your turn. Use this accountability matrix to expound upon the action planning example you created on the previous page.

<table>
<thead>
<tr>
<th>ACTION</th>
<th>RESPONSIBILITY</th>
<th>TIMELINE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Phase #1</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Phase #2</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Phase #3</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Reporting

You’ve put a lot of hard work into evaluating your program; it’s time to talk about it. The final step in the program evaluation process is to share the results.

Use the following rough outline to organize your evaluation results for reporting to senior leadership and board members, as well as external stakeholders such as funding sources and regulatory agencies.

1. Introduction
   • Title page
   • Executive summaries
   • Table of contents

2. Pre-planning
   • Background information about the organization, industry, stakeholders, and program
   • Program goals
   • Gap analysis results
   • Evaluation questions

3. Evaluation process
   • Evaluation methodology used
   • Data collection and analysis processes
   • Outcomes determined
   • Logic model

4. Results
   • Limitations of the evaluation
   • Interpretations and conclusions
   • Recommendations

Use this space to outline your own reporting strategy based on your evaluation questions, methodology, data collection, and outcomes. Here are some basic questions to guide you:

When/how often are you required to report your evaluation results?

__________________________________________________________________________
__________________________________________________________________________
__________________________________________________________________________

With which staff and stakeholders do you plan to share your evaluation results?

__________________________________________________________________________
__________________________________________________________________________
__________________________________________________________________________
What reporting mediums will you use (written, verbal presentation, webcast, podcast, etc.)?


Who will you recruit to help you?


What additional reporting requirements (if any) must you take into consideration?


**Concluding Thoughts: Time to Walk the Talk**

As we wrap up this guide to program evaluation, it is important that you transfer what you have learned into lasting personal knowledge and action. Mr. PACE is available to help complete that transfer. Take some time now to briefly revisit Mr. PACE where he appears throughout this workbook, and review the activities you completed along the way.

*Below, write the next steps you will take to begin implementing what you have learned in your organization, starting today.*