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Preface

Every day of our lives we undertake to make judgments about the world around us. In essence, whether we recognize it or not, we are participating in the process of evaluation. The graduate class of Health Education 5595 has completed a remarkable piece of work on the subject of how to make evaluation a user-friendly concept, particularly for those working in the community health field.

In reading the manual, one also has to enquire why evaluation? Why is evaluation important as part of the program planning process? In today's climate of accountability, it has become ever more important that program planners and decision makers understand the evaluation process, and ensure that measurable objectives are included in the planning framework.

Perhaps, most importantly, we must bear in mind that evaluation is essentially a political activity. Evaluations are commissioned or required for three basic purposes: to improve the program; to provide accountability to the funders; and sometimes for advocacy purposes – to convince and persuade policy makers that additional resources are required to maintain the integrity of the program. In reviewing program performance and outcomes, funders usually ask two basic questions: So what? What difference will this work make? This publication will provide the tools and resources to enable program planners to address these questions. This manual will also help planners to identify measurable indicators and to design logical frameworks that will meet the accountability needs of funding agencies.

Congratulations to the authors and to Professor Gahagan for a readable and practical 'how to' primer and for making evaluation very easy, accessible, and logical.

Carol Amaratunga, PhD
Executive Director
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Purpose

Compiling this resource guide was undertaken as part of a graduate course in measurement and evaluation (Health Education 5595). The purpose of this project is to provide an accessible, user-friendly, evaluation resource guide for community-based organizations. Basic definitions, frameworks, and examples from community, academic, and Internet resources are included. Our hope is that this guide will make planning and completing evaluations a more manageable task.

Introduction

This document includes:

1. A brief outline of how to do a needs assessment;
2. Four evaluation frameworks:
 - program **logic model**,
 - empowerment evaluation,
 - Center for Disease Control (CDC) framework, and
 - **participatory** approach; and
3. Guidance for disseminating your findings.

In addition, a glossary and resource index (academic, community, internet, and free resources) have been included at the end of the document.

The *needs assessment* can be a valuable tool for determining what your group or organization should aim to accomplish through your evaluation. An outline of the Strengths, Weaknesses, Opportunities and Threats [SWOT(C)] analysis is included—a simple way of organizing ideas and providing direction.

The *framework* acts as a step-by-step guide to the **process**, outlining the who, why, when, and how of the evaluation approach. Examples are given to provide a context for the framework information.

Dissemination—also known as a communication plan or information sharing—is often the missing piece in evaluation. Sharing evaluation ‘learnings’ is important for informing **policy** and practice, and for providing a forum for discussing future programming recommendations. Dissemination should be included in the planning phase and considered throughout the process of evaluation, not as an after thought.

Throughout this evaluation resource guide we have used the term “participant” to refer to those individuals who are taking part in the evaluation – this may involve **stakeholders** and **program** clients. The term “client” refers to individuals who are involved in the program being evaluated.

Logic Model:

An illustration of a program using a diagram or picture including planned activities and expected outcomes.

Participatory:

Involving all project stakeholders in all stages of development, evaluation, and dissemination.

Process:

Activities, strategies, or methods used to produce the desired results of a program or organization.

Policy:

A principle or plan most often put in place by governments or organizations.

Stakeholders:

Those to whom an organization is accountable or responsible.

Program:

A plan, system, or organized effort under which action may be taken toward a goal.

What Is Evaluation?

Throughout the process of compiling resources for this document, it was challenging to understand what exactly is meant by *evaluation*. It became even more difficult to differentiate between *process*, *impact*, and *outcome* evaluations. Funding agencies, organizations, and researchers often define evaluation frameworks using these words, but they may use them in different ways. For clarity's sake, the following definitions will be used throughout this document.

Evaluation

A course of action used to assess the value or worth of a program.

Process Evaluation

A type of **evaluation designed** to assess the extent to which program procedures were carried out according to a written program plan. Process evaluations are ongoing and help program providers to understand what is being done and how, and to assess what needs to be changed or improved.

Impact Evaluation

A type of evaluation designed to assess whether the program has had an immediate influence on the awareness, knowledge, skills, attitudes, or behaviours of individuals who participated in the program.

Outcome Evaluation

A type of evaluation designed to assess whether the program has achieved long-term **objectives**, such as reducing death and illness rates.

The development of the evaluation process of any program should not be separated from the development of the program itself. The evaluation questions, framework, design, plan, methods, and tools should be decided upon before the beginning of the program. The evaluation process should incorporate questions that not only meet the needs of the specific agency providing financial support to the program, but also the needs of the program's facilitators and clients.

Community-based organizations must incorporate evaluation costs into the overall program budget and be aware that a thorough, helpful evaluation will include budget items such as photocopying, staff costs, and honoraria for participants. Agencies and individuals less familiar with evaluation should be aware of the resources and help that more experienced organizations -- or individuals within their organization -- may be able to provide.

Evaluation Design:

The plan of action for an evaluation outlining the steps to follow.

Objectives:

Statements that outline the expected results of a specific activity, to be achieved within a set time, by a person or group.

Community-based:

Involving communities or groups as collaborators in programs and/or evaluations.

Needs Assessment

Conducting a needs assessment before you start planning your evaluation will provide an opportunity to consider what you really hope to 'get out of' or learn from the evaluation. Most organizations and groups will have some specific issues they really want to have addressed such as is our service being used? Other, less pertinent issues may also need addressing such as do people enjoy our office atmosphere? The questions addressed by the needs assessment will be determined by whose needs are being addressed: the participants, the organizations, the funding agency.

Usually group or organization members are the primary facilitators in conducting a needs assessment. Depending on the evaluation approach you are working within (e.g., empowerment, participatory) you may or may not want to invite program or organization participants to contribute to the identification of needs.

A Strengths, Weaknesses, Opportunities and Threats [SWOT(C)] analysis provides a reasonable framework for developing your program or organizations **goals** and objectives by considering the strengths, weaknesses, opportunities, and threats or challenges to success. Issues addressed under these headings can act as a clear, specific guide to identifying your evaluation **success indicators**.

Goal:
A broad statement of purpose.

Success Indicators:
Criteria used to evaluate the success of a program. Success indicators should reflect the program objectives

Needs Assessment: Step-by-Step

1. Identify 'Gaps'

Strengths

Identifying strengths of a program or organization involves consideration of the current situation. This may include looking at skills and knowledge of program coordinators and organization members, as well as the satisfaction of those using the programs and services. In addition, program organization, and the policies and procedures of agencies may be examined--this may include revisiting mission statements, goals, and objectives to determine if they reflect the current direction and focus of the program or organization being evaluated.

Weaknesses

It is often more difficult to think critically about what is *not* working as well as it should be, however, it is valuable to work through this exercise. Identifying weaknesses provides an opportunity to consider what conflicts or issues are making it difficult to meet your goals and objectives. Only through recognizing what is not working can change be made to improve program delivery and organization functioning. Often, outlined weaknesses offer the most significant guidance in the selection of an appropriate evaluation approach and framework. In addition, identifying the weakness will inform the purpose, goals, and objectives of the evaluation.

2. Identify Priorities

Defining priorities is important, especially when resources are few. Once you have generated a list of strengths and weaknesses, the next step is to rank the issues in order of importance--although it would be nice to address all the issues throughout your evaluation, it is often overwhelming to do so. Consider the goals and objectives of the program when ranking the issues. The issues having the greatest positive or negative influence on the delivery of your program or services should be of the highest priority.

3. Identify Opportunities and Threats/Challenges

Opportunities

Once the strengths and weaknesses have been prioritized, it is possible to start thinking about opportunities for addressing the issues within the current set-up of the program or organization. This usually requires creativity, or focusing on the issues in a different way--perhaps two weaknesses can be created into an opportunity to make change (e.g., shortage of financial resources and poor grant-writing skills can lead stakeholders to attend a free Nova Scotia Health Research Foundation grant writing seminar). Seizing opportunities can result in **capacity-building** as well as better use of resources and time.

Capacity-Building:
Skill development or enhancement by working with communities or groups through program or organization processes so participants increase their ability to sustain initiatives over time

Threats/Challenges

Understanding the threats to achieving goals and objectives of programs and organizations is essential to reorganizing. Some of these issues will become clear through the strengths and weaknesses exercise. As in the previous example, a threat to organization sustainability may be lack of funding--recognizing this weakness as a threat allows it to become a focus for change.

Empowerment Evaluation

A number of community-based organizations use an empowerment framework to guide their evaluation planning. Examples of some organization focuses include: substance abuse prevention, environmental protection, welfare reform, battered women's shelters, agriculture and rural development, and adult probation.

Empowerment evaluation is designed to guide participants – program providers *and/or* clients – through critical self-evaluation and reflection such that people help themselves and improve their programs. Often, in the beginning, an **evaluation consultant** is brought in to facilitate the process and work with the group until they are able to maintain the momentum of the evaluation independently.

Evaluation consultant:
An individual who can provide expertise in the area of evaluation to an organization.

Empowerment evaluation is an approach that may be coupled with other evaluation tools such as a logic model. Empowerment evaluation is a philosophy or way of thinking about evaluation – it is intended to be more of a democratic process involving all stakeholders (or representatives of these groups) – to foster evaluation capacity-building and self-determination. The responsibility of conducting this type of evaluation falls on the group of stakeholders. The group mediates its own evaluation proceedings--being self- and group-reflective, and attempting to keep personal biases and agendas in check.

The uniqueness of the empowerment approach to evaluation lies in its acknowledgment of and deep respect for the knowledge and experience of program and organization participants, their ability to identify program problems, and their creativity in developing and carrying out solutions.

Empowerment Evaluation: Step-by-Step

1. Establishing a mission or vision statement

The purpose of developing a mission or vision statement is to determine a guiding focus for the project or organization. This provides a starting point for developing evaluation activities and **strategies** that reflect the intended results, processes, impacts, or outcomes of the initiative. Some prefer to 'skip' this step and focus specifically on the expected impact or outcome, working backwards from these expectations to determine how they will be achieved, and adjusting the mission or vision statement to reflect the 'new' ideal. The importance lies in being sure that the mission or vision statement 'matches' what is meant to be achieved; working forward or backward is merely the process of ensuring that this happens.

Strategy:
A careful plan or method used to achieve program goals.

2. Taking stock

When 'taking stock,' the goal is to review program activities and rank them by their level of significance. Once the activities are sorted and ranked, stakeholders individually consider how well the activities are 'working' and rate them. Often a simple 1-10 rating scale is used for classifying the activities. After the activities are rated, the group comes together to compare their ratings to determine the current status of the program, and to identify strengths and weaknesses.

3. Charting a course for the future

After defining the mission or vision statement, and identifying strengths and weaknesses, it is worthwhile to revisit the goal statement of the program or organization. The benefit of confirming or redefining the goal statement is the guidance it provides for the future direction of the program or organization--usually this specifically addresses improvement of programs or services.

Once agreement on the areas needing improvement is reached, the group can focus on creating new, or adjusting existing, strategies to address the needs of the program or organization, as they relate to the goal.

4. Keeping on course

To keep the focus and to make evaluation easier in the future, it is best to develop and maintain a program and/or organization 'monitoring system'. This usually involves keeping records or documentation of program and organization 'workings' (i.e., information on services, when they are offered, who attends, satisfaction **surveys**, etc.). Documented information should reflect and provide 'evidence' to inform the objectives of program or organization strategies. Maintaining comprehensive documentation will make it easier to conduct future evaluations, as well as give stakeholders the opportunity regularly to consider 'where they are at' in relation to the program goals. Ideally, engaging in and encouraging regular record-keeping and documentation will result in the 'normalization' of evaluation within the program and/or organization.

Survey:

A tool for or means of gathering information from a target population.

Logic Model

A logic model is an evaluation tool that provides a way of illustrating a program with a diagram or picture. Usually, boxes and arrows are used to show how the program will be set up, its planned activities, and the results that are expected from it. There is no right or wrong way of developing a logic model. It is merely a useful tool to show in a picture or diagram what is going to be done, and what the expected results of the program or evaluation are.

There are three approaches to using logic models:

1. Bottom-Up Approach Starts with the *desired* effects or results and works 'up', outlining the steps that will lead to these results. This model is generally used when doing an evaluation of an existing program.
2. Top-Down Approach Starts with the pre-planned program activities and strategies that are expected to work 'down' or lead to the desired results. This model is useful for evaluating new programs that are still in the development phase.
3. Mixed Approach Both approaches may be used at the same time.

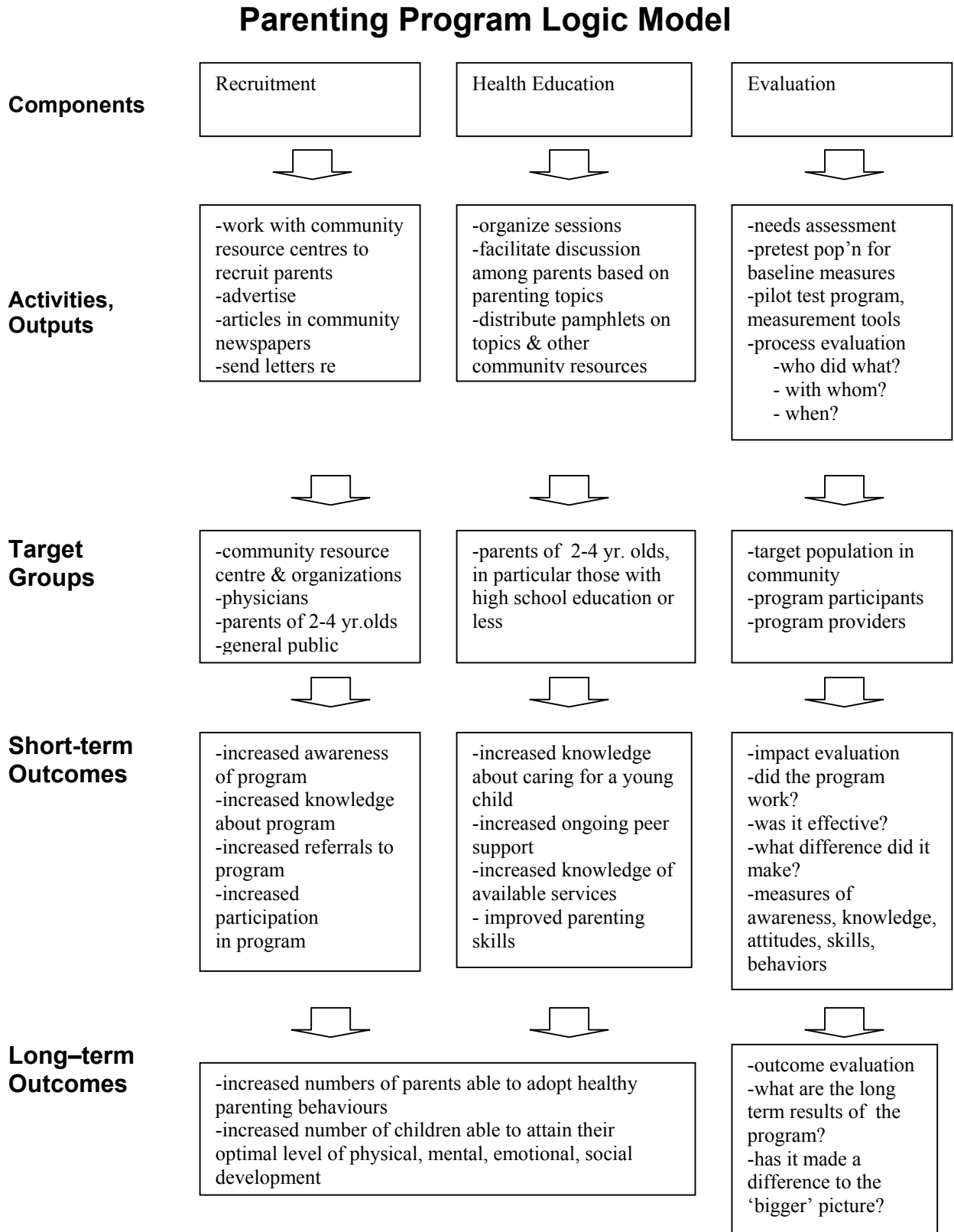
Benefits of the Logic Model

- Useful resource in program planning and evaluation
- Helps stakeholders to understand overall structure, function of program
- Helps to ensure that program activities and intended results correspond
- Helps identify key questions for the evaluation
- Conveys key elements of the program to policy makers, staff, external funding agencies, media, and colleagues
- Helps to reveal where steps in the program break down

Limitations of the Logic Model

- Initially time consuming (weeks/months)
- Requires patience
- Does not always capture all aspects of the program (e.g. program costs may not be included in the model)

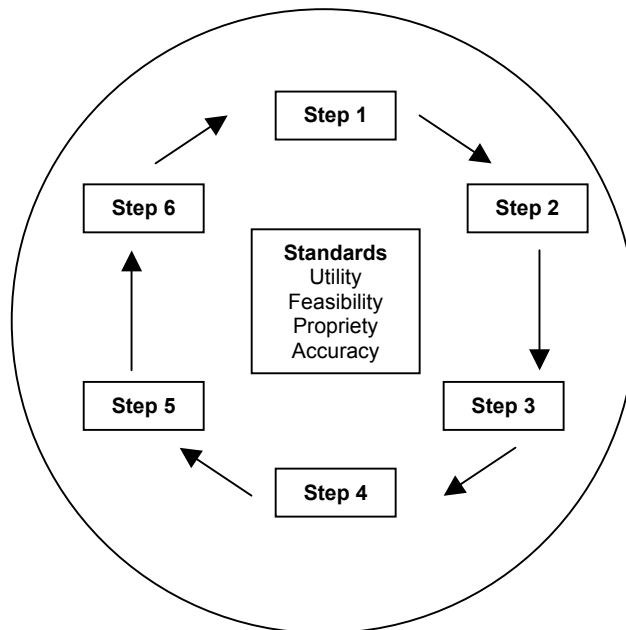
Table 1. Example of a Program Logic Model



CDC Framework

The Center for Disease Control and Prevention (CDC) organized an Evaluation Working Group that developed a framework for conducting evaluation, specifically of public health programs. The result is a six-step process that is meant to follow a continuous cycle – meaning that the components should not be considered independent of each other, but as inter-related and dependent.

Figure 1. Framework for Evaluation



This information is adapted from the Center for Disease Control web page. For more detail and information, refer to the website: www.cdc.gov/eval/index.htm

Standards for an Effective Evaluation

Four key concepts are identified and must be considered throughout the evaluation process to help ensure that it is effective.

- | | |
|--------------------|--|
| Utility | This refers to the usefulness of the evaluation and requires ensuring that the information needs of the stakeholders are met. |
| Feasibility | This refers to how practical or realistic the evaluation plan is in terms of the time and resources required to complete it. |
| Propriety | This refers to the consideration of legal and ethical matters, as well as the welfare of those involved in the evaluation and/or affected by it. |

Accuracy This refers to the **reliability** and **validity** of the evaluation and involves making clear and explicit statements about goals, objectives, procedures, purposes, conclusions, and sources of information as well as about the biases and perspectives of the evaluator(s).

Reliability:
The extent to which any measuring device yields the same results each time it is applied to a population or program

Validity:
The extent to which a test actually measures what it is intended to measure.

CDC Framework: Step-by-Step

1. Engage Stakeholders

It is important to seek opinions and participation from those who have an interest in the program being evaluated, particularly those most affected by the program and the evaluation. This will help to ensure that stakeholders ‘buy-in’ to the process, and that the evaluation will be useful and valid. It can clarify roles and responsibilities, ensure cultural sensitivity, consider ethical issues, and avoid real or perceived conflicts of interest.

2. Describe the Program

Investigating and outlining a detailed description of the program to be evaluated, including the goals and objectives, theories of change, intended effects, and success indicators, is essential. A program logic model could be used for this purpose. This step helps to ensure fairness and accuracy by facilitating an understanding of how the features of a program interconnect and relate to the broader context of the organization, the community, and other similar programs.

3. Focus the Evaluation Design

This step entails working with stakeholders to clarify the purpose, the intended uses and users of the results, and the specific questions that should be answered by the evaluation. It is also important at this stage to determine practical methods for **sampling** participants, and collecting, analyzing, and interpreting the **data**. This helps to ensure the quality of data, and that the completion of the evaluation will be feasible.

Sampling:
Using a part of the population in order to understand what is occurring in the larger population.

Data:
Observations or measurements that can be qualitative or quantitative.

4. Gather Credible Evidence

Gathering credible – reliable and valid – data is essential for ensuring that the results of the evaluation are useful for stakeholders. This means that it is important to make sure that those responsible for collecting, analyzing, and/or interpreting the data are properly trained in the research methods being used.

Ethical considerations must be addressed at this time and throughout the evaluation process. Evaluation participants must provide **informed consent** before being involved in evaluation activities (e.g., filling out surveys, interviews, etc.). This is intended to protect the rights of both the participants and the organization.

5. Justify Conclusions

This involves critical analysis and synthesis of the information obtained through the evaluation. It is important to consider alternative interpretations of the data, as well as other possible explanations of the findings. In addition, It is imperative at this stage to make clear recommendations for actions and/or changes that are consistent with the findings.

6. Ensure Use and Sharing of Lessons

Once an evaluation is completed, it is essential that stakeholders are made aware of the evaluation procedures and findings, that the findings are used to guide decisions or actions affecting the program, and that checks are conducted to learn if those involved benefitted from the experience, either by learning about the process of evaluation or by valuing the findings. Because this involves returning to the stakeholders with a report or presentation of the findings (and what to do with them), it returns to the first step of the cycle – engaging stakeholders.

Ethics:

Codes of behaviour determined by moral principles and values to guide researchers and practitioners, and enforced by research governing bodies

Informed consent:

An ethical requirement where participants give permission for the sharing of their information and experiences. This usually involves signed agreements which are intended to protect the participants and guarantee their anonymity.

Participatory Evaluation

Participatory projects are based on taking direction from, and working *with* (rather than working *on*), the people who are in programs and clients at organizations. So, it should come as no surprise that participatory evaluations require the direct involvement of the program or organization participants. Like empowerment evaluation, the participatory approach is a philosophy or way of focusing and directing evaluation. The philosophy, simply, is that participatory evaluation is about stakeholder participation.

The goal of participatory evaluation is to involve as many people as possible in the process. This helps ensure that many voices are heard and taken into account in the final evaluation report. Ideally, the evaluation process will involve a diverse representation of the stakeholders who will contribute to all levels of the evaluation—planning, information gathering, analysis, and dissemination.

For an evaluation to be truly ‘participatory’, stakeholders at all levels (i.e., clients, administrators, coordinators, volunteers, etc.) should be involved. ‘Involvement’ means that they should:

- Bring a first-person understanding of the issues faced by participants;
- Have a ‘voice’ in identifying progress, obstacles, strengths, and weaknesses;
- Have a role in information provision, collection and analysis; and,
- Build capacity and skill development through their involvement in the evaluation process.

A participatory approach to evaluation is one of the more flexible frameworks. Projects focusing on skill and capacity-building are well-suited to this evaluation style. However, participatory evaluation techniques can be used for all kinds of programs and projects as well as during process, impact, or outcome evaluations.

While flexible in style, a participatory approach also provides a way for the organization to perform continual ‘**member checks**’. This means that by using a participatory approach, the members of the population being influenced by the **intervention** or organization can have direct involvement in determining what information should be collected, how it should be gathered, and ‘what it all means’ in the end. This is a valuable characteristic. Often evaluations are done by people outside of the program, which can sometimes lead to missed information, or a misinterpretation of information. By continually member-checking, the information will be more accurate and useful.

Member Check:

Verification that qualitatively gathered, transcribed information, accurately reflects participant ideas and opinions.

Intervention:

A systematically designed program meant to affect change in a defined population in a specified amount of time.

Although a very valuable approach, participatory evaluation can be incredibly taxing on individuals’ and organizations’ time, resources, and patience. Plenty of time is necessary for conducting this type of evaluation, especially for gathering input from the stakeholders and analyzing the information. As well, where there are long time commitments there tends to be a need for greater financial resources to sustain the process. In other words, this approach can require a fair amount of money. Finally, patience, patience, patience! Working at the community level is always challenging, particularly when trying to involve a diverse population

and collect information while continuing to build skills and capacity throughout the organization and client-base. Not all organization staff or clients are skilled in evaluation, therefore time must be allotted for learning.

When it comes to 'doing' a participatory evaluation, creativity is key. The challenge of this type of approach is finding data collection methods that will allow capacity-building while information is gathered, in the quickest amount of time, for the least amount of money! So, creativity comes into play when attempting to make it all come together.

Finally, it is important to note that truly participatory projects are not led by one individual or a small group of 'decision-makers'. Usually a steering committee, with members representing all the stakeholder groups, is responsible for negotiating memoranda of understanding and terms of reference. This helps ensure that everyone has a voice and shares a purpose. The challenge to working in a participatory manner is diplomatic negotiation and shared 'best-interests'. This challenge can be met by having a skilled facilitator with considerable background knowledge of the issues to chair meetings and build **consensus**. No one agenda is to be met; it is about the collective agenda. Only then is it truly participatory.

Consensus:
An opinion held by most.

Dissemination

Dissemination refers to how the results of a program evaluation are communicated to the program's stakeholders and policy makers, and to the general public. The purpose of disseminating the results of a program evaluation is to share information and lessons learned, to provide a forum for discussing future programming recommendations, and to initiate and/or solidify relationships.

A common misunderstanding is that dissemination can be dealt with as an afterthought, once the evaluation is complete. For dissemination to be effective it should be carefully laid out in the planning phase of an evaluation.

Dissemination Step-by-Step

1. Figure out who the stakeholders are.

Ask yourself: Who will be affected by the program evaluation and the potential findings? (i.e. program users, program staff, board of directors, funding agencies, policy audiences, researchers in the same field).

2. Start talking with all the stakeholders to find out what evaluation questions they would like to have asked.

This is part of the initial evaluation planning, but will have a large impact on dissemination. Methods of communication, including a schedule for information dissemination, should be worked out at this time. Once the evaluation is over you have to know what your stakeholders want to know about it so that you can prepare a presentation for them that addresses their particular information needs.

3. Maintain open communication with your stakeholders through progress reports.

This will ensure that you've kept the stakeholders in the loop, so there will be no large surprises when the results of the evaluation finally come out.

4. While conducting your evaluation, learn as much as possible about all of the components and 'realities' of your program. This will help ensure that you are knowledgeable enough to frame your evaluation questions properly and interpret the findings with insight.

If an evaluator does not know the characteristics of the program they are evaluating, their evaluation and subsequent recommendations may not be realistic. For example, if evaluators do not take program funding or staffing issues into consideration, they may make recommendations that a program does not have the resources to support.

5. Work out a 'dissemination understanding or contract' with your stakeholders.

For example, who owns the evaluation findings when you are done? Are you allowed to publish them for academic purposes? What happens if the evaluation results are 'unflattering' to the organization being evaluated? How will **confidentiality** be maintained?

This should be discussed during planning and if possible an agreement should be signed.

Confidentiality:

Ensuring that no identifying information regarding participants is revealed during the course of research, programs, and evaluation.

6. Create a timeline for dissemination.

Dissemination should occur regularly (as needed) throughout the evaluation. It is wise to determine an outline before the evaluation begins. This will allow the researchers to schedule and secure time with the stakeholders to discuss the evaluation findings. When planning your dissemination schedule, remember that meetings can be expensive and time consuming. Do not waste the time or money of your organization by planning meetings that are not necessary or productive.

7. Determine how you want to present your findings and recommendations to your different stakeholders. One presentation will not work for all the different stakeholders.

Ask yourself questions such as:

- Should I present the information orally or in a written report?
- How long should my presentation be?
- Do I want to use graphs, charts, quotations, etc. to express my findings?
What audiovisual equipment do I need to present my findings? (television, projection screen, laptop, overheads, handouts)
- Do I need to book a room for a presentation?
- Should refreshments be served?
- Who should be invited to attend?
- How formal or informal should this presentation be?

8. Determine what information the presentation (oral or written) should contain.

Here are the general guidelines for each type of presentation.

Oral presentation

A presentation should include a brief overview of the program's characteristics and goals, a brief description of the evaluation plan, rationale, and data analysis, followed by a more detailed discussion of the evaluation results and recommendations. If the stakeholders have been engaged in the process the whole way through, they will already be familiar with the program and evaluation plan. The oral presentation should be used as a forum for discussing the results and recommendations.

Written report

You must design the written report to meet the needs of the audience you are sending it to. The following are generally recommended formats to be used, depending on your audience. It is beneficial to discuss the format with your stakeholders:

- **Research paper with abstract:** uses academic language, focussed on methodology, appropriate for academic conferences and journals
- **Final evaluation report (in its complete form):** user-friendly, highlights all components, with focus on results and recommendations, should have an executive summary, should be detailed enough to be kept on file and help inform future program planners/evaluators
- **Summary of final evaluation report (2-10 pages):** general overview of program and evaluation plan, focus on findings and recommendations
- **Press release:** focus on findings, recommendations, and impact on program users and community
- **Newsletter or 'report card':** often used to provide information to program users

Each program evaluation tool can be used in combination with other tools in order to strengthen the results. For example, the themes and explanations revealed from focus groups can provide depth to the answers given in surveys. One tool for evaluation can be used to complement the results of another.

Focus Groups

A focus group is a data collection method in which a group of participants, voluntarily representing the target population, are brought together to informally discuss certain topics and issues. It is best if an 'interview guide,' or predetermined set of questions, are prepared in advance – this will assist in keeping the conversation on topic and provide start-up questions if the discussion is waning.

Focus groups require extensive organization, so start preparing early: details, such as booking a room, arranging travel for participants, if necessary, and creating your evaluation questions, will take time to work out.

Usually 6-10 participants are invited to take part in a focus group. Book focus group participants early – and do not forget to inquire about special needs of participants (e.g., mobility issues, reading/hearing/visual impairments, etc.).

For more information on organizing a focus group, refer to the following website:

www.mapnp.org/library/grp_skill/focusgrp/focusgrp.htm

Record Keeping and Data Management

Records kept on utilization rates, partnerships, staffing, resource use and needs, etc., provide valuable information for evaluators and are crucial to managing a program. Well-organized records will assist evaluators in learning more about the program history and tracking some important program characteristics in an exploratory or statistical manner. These records can help shape an evaluator's impression of how a program or organization is operating on any given day.

A simple, but effective means of organizing information from program and organization records is in a **database**. Databases are structured files of information, or a set of related data that are stored, sorted, and retrieved most often using a computer. Databases are relatively easy to use after a brief tutorial, and will make your information much more accessible to your stakeholders. Depending upon your needs, some statistical and data

Database:

A structured file of information or a set of related data that are stored, sorted, and retrieved, most often using a computer.

management and analysis programs that can be used are SPSS (**quantitative** analysis) and QRS NU*DIST (**qualitative** analysis).

For more information on records management and creating and using databases, refer to the following websites:

www.mapnp.org/evalontheweb.htm

www.n-i.nhs.uk/dataprotect/related_articles/records_record_keeping.htm#introduction

Quantitative:

Characteristic measurement through the assignment of numeric values.

Qualitative:

Understanding a phenomenon from the perspective of the participant.

Surveys

Using a survey technique is common in program evaluation. In a survey, information concerning opinions, practices, or beliefs is obtained from a sample of the target population. The information provides a basis for making comparisons, determining trends, and revealing strengths or weaknesses in any given program. As with all methods there are some limitations. Surveys only determine what the current situation is. Surveys do not reveal what factors influence behaviours or attitudes.

For more information on developing surveys, design products, and general information, refer to the following websites:

Survey construction: www.au.af.mil/au/hq/selc/smplIntro.htm

Survey design products: www.surveyconnect.com/fproducts.html

General information: www.eval.org/

Interviews

Interviews are most commonly used when the evaluator needs to explore questions that participants may not be able to answer through surveys or **questionnaires**. Interviews tend to focus on the participants' feelings, values, or beliefs that the participant may not want to discuss in a group, therefore eliminating the possibility for the evaluator to use the focus group method. Interviews may be structured (each participant interviewed is asked the same questions), semi-structured (each participant is asked the same general questions), unstructured (letting the conversation develop usually starting with one general question).

Questionnaire:

A series of questions and/or statements on a particular topic(s) given to a participant.

For more information on oral history interviews or interview guidelines, refer to the following websites:

Oral history interview: www.tcomschool.ohiou.edu/cdtm/conducti.htm

Guidelines for interviews: www.mapnp.org/library/evaluatn/interview.htm

www.ku.edu/cwis/units/coms2/via/conducting.htm

Case studies

Case studies are used as examples to outline the in-depth study of an individual, group, organization, or community regarding a **variable** of interest. It usually includes significant background information, an explanation of the situational context, and an analysis of how it relates to a specific topic.

Variable:
A specific characteristic that is being measured or observed.

For more information on case studies, refer to the following website:
www.slais.ubc.ca/resources/research_methods/case.htm

Websites, Free Resources, and Courses

The following are useful websites with information on evaluation topics or specific examples of program evaluations that have been completed. There are also many resources, such as reports and tool kits, that can be obtained for **FREE**, either on-line or by sending away, these items are indicated by **F**.

Adobe® Acrobat Reader® is software that allows you to download pdf files into a readable format that you can save on your computer or print off. Many websites have reports and documents that can only be opened and read with this software and therefore it is extremely useful to have. It is freely available from this web site but it may take a while to download it onto your computer.

F www.adobe.com/products/acrobat/readstep2.html

Search engines are huge internet databases that you can use to search for information on just about anything. They provide lists of all websites that contain the search words you entered. There are literally thousands of evaluation resources on line, so we suggest that you use a search engine if you are looking for something specific. By simply typing in “process evaluation” or “transitional housing evaluation”, for example, you will be provided with sites containing definitions, examples, and more. We suggest: www.google.ca

For more health specific searches try:

The Canadian Health Network: www.canadian-health-network.ca

Health Canada: www.hc-sc.gc.ca

The Health Promotion Clearinghouse: www.heart-health.ns.ca/hpc/

General Evaluation Sites

Non-Profit Research Evaluation Services, Inc (NPRES – This site contains a very comprehensive review of evaluation issues. It has links to great sites, tutorials, grants information, information on research methods, and so on.

npres.org/evalontheweb.htm

Human Resources Development Canada – This site has downloadable pdf-files (requires Adobe® Acrobat® Reader, which can also be downloaded for free) on evaluations of government sponsored programs, ranging from employment programs, to youth training centres, to adult literacy initiatives. It also has four downloadable tool kits.

F www11.hrdc-drhc.gc.ca/edd/v_report.report_index

Links – These sites offer links to evaluation-related sites and organizations.

web.uvic.ca/~chpc/links.htm

www.twu.edu/hs/hs/hs5483/evlinks.htm

The Workstation – This is a free, interactive suite of evaluation and planning tools designed especially for non-profit agencies. Innovation Networks, the provider, is “dedicated to building skills, knowledge, and processes within public agencies and nonprofits to improve their overall organizational learning and **effectiveness**”. They offer other services, such as workshops and consultation.

Effectiveness:
The actual change produced among a sample population under normal program conditions.

F innonet.org/workstation/about.cfm

Community Tool Box – This organization is dedicated to promoting “community health and development by connecting ideas and resources”. There is a lot of information on evaluation of community programs and initiatives, including an online text book, an evaluation framework, a chat room, plenty of useful links, and more. Some reports and articles are available for free.

F ctb.ku.edu

Research Methods and Evaluation Textbook – This is a textbook that is available entirely on-line. It has introductory information on research methods and evaluation, and includes information on empowerment evaluation, creating an evaluation culture in your organization, and so on.

F trochim.human.cornell.edu/kb/contents.htm

Also check out this site for the *W.K. Kellogg Foundation Evaluation Handbook*:

F wkkf.org/Publications/evalhdbk.htm

Evaluation Societies

Canadian Evaluation Society – The website has lots of evaluation information and resources, including information on upcoming CES events and memberships.

www.evaluationcanada.ca/

American Evaluation Association – Also has tons of evaluation information and resources.

www.eval.org/

Tools and Measurement Instruments

Surveys and Evaluation – This site contains information on using, developing and implementing surveys. Included are detailed notes and definitions. There is also information on survey development software that can be ordered, as well as a request form for free demo software and free registration for various evaluation related Webinars (on-line seminars)

F www.ncspearson.com/survey/index.htm

Parent and Family Related Evaluations – This website has bibliographies on violence prevention, child abuse, welfare reform, and so on, as well as measurement instruments used in studying issues related to adolescent sexuality, parenting, child abuse, violence prevention, and general evaluation instruments.

www.nnfr.org/eval/

For a full guide to evaluating parenting-education programs, including framework, needs assessment, and more, see:

F www.nnfr.org.eval/pareval

Frameworks

Centre for Disease Control – The Evaluation Working Group at the CDC has developed a framework for evaluation of public health programs. The framework is included in this book, but the website offers additional information.

www.cdc.gov/eval/index.htm

Participatory Evaluation – This website provides a guide to conducting evaluation using a participatory approach.

www.hc-sc.gc.ca/hppb/phdd/resources/guide/evaluation.htm

Empowerment Evaluation – This website provides detailed information on collaborative, participatory, or empowerment evaluation.

www.stanford.edu/~davidf/empowermentevaluation.html

Strengths and Weaknesses – This site provides a critique of many of the different frameworks and models that are used by various organizations (e.g. the United Way, Health Canada, Boys and Girls Clubs, Goodwill Industries) for evaluating programs.

www.ccp.ca/information/documents/gd44j.htm

Evaluation Examples

Process Evaluation – This site provides a definition of and framework for process evaluation. It also contains examples of process evaluations.

www.bja.evaluationwebsite.org/html/roadmap/beyond/process_evaluation/

Impact Evaluation – This site provides a definition of and research designs for impact evaluation. It also contains links examples of impact evaluation.

www.bja.evaluationwebsite.org/html/roadmap/beyond/impact_evaluation/

Outcome Evaluation – This is the site of the Outcome Measurement Resource Network. There are some great downloadable reports available.

national.unitedway.org/outcomes/

Courses in Evaluation

The **Non-Profit Sector Leadership Program** – This program is offered through Henson College at Dalhousie University. It provides a series of workshops and courses, as well as consultation services, designed particularly for community organizations. For more information on the program call: (902) 494-1683

The mission of the program is to build capacity within voluntary, non-governmental, and community organizations. Instructors with practical experience with community organizations and education credentials currently offer eight certificate-level courses (30 classroom hours):

- Leading and Managing Non-profit Organizations
- Financial Management
- Strategic and Operational Planning
- Board, Government, and Community Relations
- Human Resource Development
- Marketing and Public Relations
- Fundraising and Resource Development

- **Program Evaluation for Community Organizations**

This course was developed in recognition of the increasing importance of evaluation in program planning. The course involves practical assignments, and students are encouraged to use a program from their own organization. The topics covered in this course include: purpose of evaluation; measurement and design; qualitative research; data analysis and interpretation; scheduling and budgeting; and ethical considerations.

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Evaluation Examples and Theory

NOTE: While the resources provided are organized into subject areas, the information within them may be transferred across subject areas – for example, the methodology of an evaluation can be applied to different subject areas.

Addictions

Alcohol, Tobacco, and Other Drugs

Cheadle, A., Wagner, E., Anderman, C., & Walls, M. (1998). Measuring community mobilization in the Seattle Minority Youth Health Project. *Evaluation Review*, 22(6), 699-716.

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Harper, G. W., & Carver, L. J. (1999). "Out of the mainstream" youth as partners in collaborative research: Exploring the benefits and challenges. *Health Education and Behavior*, 26(2), 250-265.

Langevin, C. M. (2001). An evaluation framework for The Maison Decision House substance abuse treatment program. *The Canadian Journal of Program Evaluation*, 16, 99-129.

Lieberman, L. D. (1998a). Evaluating the success of substance abuse prevention and treatment programs for pregnant and postpartum women and their infants. *Women's Health Issues*, 8(4), 218-229.

Lieberman, L. D. (1998b). Overview of substance abuse prevention and treatment approaches in urban multicultural settings: The Center for Substance Abuse Prevention Programs for Pregnant and Postpartum Women and Their Infants. *Women's Health Issues*, 8(4), 208-217.

Magura, S., Laudet, A., Kang, S., & Whitney, S. A. (1999). Effectiveness of comprehensive services for crack-dependent mothers with newborn and young children. *Journal of Psychoactive Drugs*, 31(4), 321-322.

McBride, N., Midford, R., Farrington, F., & Phillips, M. (2000). Early results from a school alcohol harm minimization study: The School Health and Alcohol Harm Reduction Project. *Addiction*, 95(1), 1021-1042.

Gambling

Dumont, M., & Ladouceur, R. (1990). Evaluation of motivation among video-poker players. *Psychological Reports*, 66(1), 95-98.

Ladouceur, R., Vezina, L., Jacques, C., & Ferland, F. (2000). Does a brochure about pathological gambling provide new information? *Journal of Gambling Studies*, 16(1), 103-107.

Caregiving

Heary, C., & Hennessy, E. (2002). The use of focus group interviews in pediatric health care research. *Journal of Pediatric Psychology*, 27(1), 47-57.

Heights, R., Akinbami, L. J., Cheng, T. L., & Kornfeld, D. (2001). A review of teen-tot programs: Comprehensive clinical care for young parents and their children. *Adolescence*, 36(142), 381-393.

Jaeger, E. A., Shlay, A. B., & Weinraub, M. (2000). Child care improvement on a shoestring: Evaluating a low-cost approach to improving the availability of quality child care. *Evaluation Review*, 24(5), 484-515.

Kataoka-Yahiro, M., Tessier, K., Ratliffe, C., Cohen, J., & Matsumoto-Oi, D. (2001). Learning-service community partnership model: A pediatric program evaluation. *Journal of Pediatric Nursing*, 16(6), 412-417.

Schneider, K., Wilbin, R., Downs, K., & O'Donnell, A. (2001). Methods for evaluating the provision of well child care. *Journal of Quality Improvement*, 27(2), 673-682.

Culture

Immigrant Services

Blake, S. M., Ledsky, R., Goodenow, C., & O'Donnell, L. (2001). Receipt of school health education and school health services among adolescent immigrants in Massachusetts. *The Journal of School Health*, 71, 105-113.

Truelove, M. (2000). Services for immigrant women: An evaluation of locations. *Canadian Geographer*, 44(2), 135-151.

Discrimination

Harper, G. W., & Carver, L. J. (1999). "Out of the mainstream" youth as partners in collaborative research: Exploring the benefits and challenges. *Health Education and Behavior*, 26(2), 250-265.

Education/Language

Blake, S. M., Ledsky, R., Goodenow, C., & O'Donnell, L. (2001). Receipt of school health education and school health services among adolescent immigrants in Massachusetts. *The Journal of School Health*, 71, 105-113.

Harper, G. W., & Carver, L. J. (1999). "Out of the mainstream" youth as partners in collaborative research: Exploring the benefits and challenges. *Health Education and Behavior*, 26(2), 250-265.

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Mental Health

Counseling

Mercier, C., Pait, M., Peladeau, N., & Dagenias, C. (2000). An application of theory-driven evaluation to a drop-in youth center. *Evaluation Review*, 24(1), 73-91.

Depression

Center for Disease Control and Prevention. (1998). Suicide prevention evaluation in a western Athabaskan American Indian tribe – New Mexico, 1988-1997. *Morbidity and Mortality Weekly Report*, 47(13), 257-261.

Badger, T., Dumas, R., & Kwan, T. (1996). Knowledge of depression and application to practice: A program evaluation. *Issues in Mental Health Nursing*, 17, 93-109.

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Winzelberg, A. J., Taylor, C. B., Sharpe, T., Eldredge, K. L., Dev, P., & Constantinou, P. S. (1998). Evaluation of a computer-mediated eating disorder intervention program. *International Journal of Eating Disorders*, 24, 339-349.

Learning Disorders

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Nutrition

Body Image and Eating Disorders

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Physical Activity

Community-Based

Kalafat, J., & Illback, R. J. (1998). A qualitative evaluation of school-based family resource and youth service centers. *American Journal of Community Psychology*, 26(4), 573-605.

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Safety

Housing

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Zima, B. T., Bussing, R., Forness, S. R., & Benjamin, B. (1997). Sheltered homeless children: Their eligibility and unmet need for special education evaluations. *American Journal of Public Health*, 87, 236-240.

Violence

Cheadle, A., Wagner, E., Anderman, C., & Walls, M. (1998). Measuring community mobilization in the Seattle Minority Youth Health Project. *Evaluation Review*, 22(6), 699-716.

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Adolescents

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Glossary of Terms

Terms included in this glossary are ones you may encounter as you undertake evaluation.

Anonymity The practice of not releasing names or other identifying information (i.e., profession, place of residence, etc.) of people who want to keep their thoughts or feelings confidential--this is usually outlined in a confidentiality agreement.

APA (American Psychological Association) A manual that provides writing guidelines for formatting and publication.

Baseline data, baseline measures Measurements taken of the target population before a program or intervention begins. They are used for comparing the data collected during and after the program, to determine the impact or outcome of the intervention.

Benchmarking Measuring progress from one interval to another, often accomplished by record keeping (e.g., number of individuals participating in a program from one year to the next).

Capacity-building Skill development or enhancement by working with communities or groups through program or organization processes (e.g., program planning, program evaluation, etc.) so participants increase their ability to sustain initiatives over time.

Case study An in-depth study of an individual, group, organization, or community regarding a variable of interest.

Collaborator Individuals, agencies, businesses, or government organizations that are working jointly and actively on a program and/or evaluation.

Community-based Involving communities or groups as collaborators in programs and/or evaluations.

Comparison group A group of individuals with characteristics similar to members of the experimental group, but who do not participate in the program being evaluated, or who participated in a similar program. Used in quasi-experimental designs.

Confidentiality Ensuring that no identifying information regarding participants in research and/or a program is revealed during the course of research and evaluation.

Consensus-(based) An opinion held by all or most.

Control group A randomly assigned group of individuals who do not participate in the program being evaluated. Used in experimental designs.

Cost-benefit analysis To determine how resources are best used. Shows the relationship between a program intervention cost and the dollar benefit received

Cost-effectiveness analysis How much it costs to produce a certain effect in monetary terms.

Cost-utility analysis The usefulness of a program intervention determined by the subjective value of a stakeholder rather than monetary costs.

Data Observations or measurements that can be qualitative or quantitative.

Database A structured file of information, or a set of logically related data that are stored, sorted, and retrieved, most often using a computer.

Descriptive research Uses methods and procedures to gather raw data and generate data structures that illustrate the characteristics of the target population.

Dissemination The method by which you share your findings with stakeholders.

Effectiveness The actual change(s) produced in a sample population under normal program conditions.

Efficacy The potential for a new intervention to produce change in a sample population under the optimal program conditions.

Ethics Codes of behaviour determined by moral principles and values that guide researchers and practitioners, and are enforced by research-governing bodies.

Evaluability assessment A program analysis tool used by an evaluator to learn more about a program in practice (in addition to formal and theoretical information about the program on paper), such as the implicit goals of various stakeholders. *see Poulin et al. (2000)

Evaluation A course of action used to assess the value or worth of a program.

Evaluation consultant An individual who can provide expertise in the area of evaluation.

Evaluation design The plan of action for an evaluation outlining the steps to follow. It organizes the evaluation and provides guidance for systematic data collection, analysis, and reporting.

Evaluation framework The broad theoretical basis for an evaluation. A statement of theory about how the program inputs translate through a series of steps to program outputs.

Experimental design Involves random assignment of participants to an experimental group or control group, where participants of both groups are measured/assessed by the same means. This design offers the greatest control over the many factors that could influence the findings of a study, and is considered to produce the most understandable, reliable, and valid evidence of the effectiveness of a program.

Experimental group, *treatment group* A group of individuals who participate in the program being evaluated, or who receive the intervention. Used in experimental designs.

External evaluation An evaluation conducted by an individual who is not personally involved in providing or participating in the program.

Focus groups A data collection method where a group of participants, representing the target population, are brought together to discuss certain topics and issues.

Formal evaluation An evaluation process characterized by structured, systematic procedures, such as planned activities, prescribed procedures or protocols, well-defined measurement tools, and success indicators. It is generally used to make major decisions about a program.

Formative evaluation An evaluation process designed to gather data and information during the process of development and implementation of a program. The data and information can be used to improve the program.

Goal A broad statement of purpose.

Impact evaluation An evaluation process designed to assess whether the program of interest has had an immediate influence on the attitudes, awareness, knowledge, skills, or behaviours of individuals who participated in the program.

Informal evaluation Unplanned, unsystematic evaluation generally used for making small changes in a program.

Informed consent An ethical requirement in research whereby participants give permission for the sharing of their information and experiences. This usually involves signed agreements (i.e. confidentiality agreements) which are intended to protect the participants and guarantee their anonymity.

Input Materials that the organization or program takes in and uses to achieve the aims of the program (e.g. people, money, equipment, ideas, time, facilities, supplies)

Internal evaluation An evaluation conducted by an evaluator who is personally involved in the program.

Intervention A systematically organized program (its content, procedures, and measurement tools) designed to affect change in a defined population during a defined period of time.

Likert scale A style of questioning designed to measure a particular attitude or belief. A numeric rating scale is assigned to responses based on the degree of agreement with the statement.

Logic model A way of illustrating a program with a diagram or picture. Usually, boxes and arrows are used to show how the program will be set up, its planned activities, and the results that are expected from it.

Member-check Verification that qualitatively gathered, and transcribed information accurately reflects participant ideas and opinions.

Needs assessment A determination of the needs of the target population for a particular program.

Objective A statement that outlines the expected or estimated results of a specific activity to be achieved within a set amount of time by a person or group of people.

Open-ended questions Questions that allow the participant to answer however they choose, offering detail and elaboration beyond yes or no

Operational definition A statement of the methods or procedures that will be used to define a particular variable.

Outcome evaluation An evaluation process designed to assess whether the program of interest has achieved long-term objectives, such as reducing mortality and morbidity rates.

Outcome measures Measurements of key variables that are used to determine what effects the program had and what it did or did not accomplish.

Output Results of the major processes in the program or organization.

Participant observer An observer/evaluator who actually participates in the program/evaluation.

Participatory Involving all project stakeholders in all stages of development, evaluation, and dissemination.

Policy A principle, plan, or course of action that is put into place or carried out by governments, organizations, or individuals.

Post-test Measurements on any particular variable taken after the program intervention has ended.

Process Activities, strategies, or methods used to produce the results desired by the program or organization.

Process evaluation An evaluation designed to assess the extent to which program procedures are carried out according to a written program plan. Process evaluations help program providers understand what is being done and how, and to assess what needs to be changed or improved.

Program A plan, system, or organized effort under which action may be taken toward a goal.

Qualitative research A category of research designs or models, all of which elicit data in the form of descriptive narratives like field notes, recordings, or other transcriptions from audio- and videotapes and other written records.

Quantitative research A means of measuring characteristics (e.g., gender, income, marital status, etc.) through the assignment of numeric values. The numeric values are statistically analyzed to identify 'significant' characteristics or issues of interest.

Quasi-experimental An experimental design that lacks either random sampling of participants or random assignment of participants into the control group or experimental group.

Questionnaire A series of questions and/or statements given to a participant to complete anonymously and return to the organization. It may include open and /or closed ended questions.

Random assignment Assigning research participants to an experimental or control group by chance. This minimizes the existence of preexisting differences between the participants in

each group.

Randomized trial A research design whereby participants are assigned at random to an experimental or control group. It is not known until after the data collection is complete which group the participant is assigned to.

Reliability The extent to which any measuring device yields the same results each time it is applied to a population/ program.

Sampling Using a part of the population in order to understand what is occurring in the larger population.

Secondary records Information originally collected for another program or intervention that is being used for the purpose of the current program or evaluation.

Stakeholders Individuals, groups, organizations, and agencies to whom an organization is accountable or responsible. Those people who have a particular interest in a program and/or the agency offering the program. This may include (but is not limited to) similar agencies/ programs, participants in programs/research, funders, staff, volunteers, customers, regulators.

Strategy A careful plan or method used to achieve program goals.

Success indicators Criteria used to evaluate the success of a program. Success indicators should reflect the program objectives.

Summative evaluation Measurements and/or judgments that allow conclusions to be drawn about the impact, outcome, or benefits of a program or intervention.

Survey The gathering of information from a target population (e.g. phone survey, door-to-door, mail, census).

Telephone interview A more economic method for conducting interviews. These are particularly useful when performing large-scale research with many participants.

Theory An idea meant to explain why 'things' happen in a certain way. Meant to inform or direct planning processes to be sure that the greatest number of issues, factors, or variables can be accounted for.

Unit of analysis That which is being assessed is called the unit of analysis. A person, group, organization, or community that receives an intervention and is measured on a variable, may be considered a unit of analysis.

Validity The extent to which a test actually measures what it is intended to measure.

Variable What is being measured or observed.



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