Collecting Data

Introduction

"If I don't ask, I just think I know everything, and I don't."

(Quote from a project research participant)

Welcome to the **Collecting Data** module, one of eight online modules created as part of the Developing a Culture of Evaluation project. This project was conducted through a partnership between Community Literacy of Ontario and Literacy Link South Central.

This module, like all of the modules developed for this project, aims to provide practical, useful information, with a focus on small non-profits with limited budgets and limited staff resources. The modules have been written to meet the needs of the non-profit sector as identified during online research, key informant interviews and a provincial survey conducted at the outset of the project.

These are the eight online modules available from our project:

1	Introduction to Evaluation
2	Planning for Evaluation
3	Collecting Data
4	Analyzing Data
5	Taking Action
6	Communicating the Results
7	Case Study: The Evaluation Cycle in Action
8	Trends in Evaluation

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Whatever type of evaluation you are using, and whether you are evaluating your overall organization or just one program or service that you offer, your goals will be to:

- assess how your services (or a specific component of your organization such as marketing, staff/board performance, or a fundraising activity, for example) operates
- identify and document your organizational strengths and weaknesses
- measure the impacts your programs or services are having
- identify areas for improvement to maximize that impact and take steps towards implementing that improvement

Please note that throughout the modules we use the term “stakeholders” to refer to any individuals, groups or other organizations that you interact with. We use the term “clients” as a generic term to include the people who use your programming and services. So, clients are stakeholders, but stakeholders also refers to staff, volunteers, partner agencies, funders, and even the general public if what you do impacts them in some way.

We hope that these online modules are helpful to you in the important work that you do!

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Overview of the Collecting Data Module

Our **Collecting Data** module will help you build a culture of evaluation by exploring the type of data you should be collecting during your evaluation activities and the various ways that you can effectively and efficiently collect that data. We will also share some sample tools and templates that you can adapt for your own needs.

Data collection is a key component of the evaluation cycle, which was introduced in the Introduction to Evaluation module. In our research into the evaluation needs of small, non-profit organizations in Ontario, people clearly told us that they want to know more about evaluation, why it matters, and how to manage and carry out each of the steps in the cycle.

As a reminder, here is what that cycle consists of:

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Module Overview

In this module, we will overview the steps involved in collecting data for an evaluation and the differences between informal and formal evaluation. We will look at various ways of collecting data including surveys, focus groups, and key informant interviews. We have also included sample questions that you can use with various stakeholder groups.

This module is not intended to be a “how to” guide. Instead, it will give you ideas and suggestions for how to manage data collection in your organization. Not every idea will be applicable to every agency, and it will be up to you to determine the best approach for your non-profit to take.

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"We need to make sure our programs are meeting the needs of our community."

(Quote from a project research participant)

In order to measure your organization's impact and its internal operations, or to discover what you are doing well and where you need to improve or make changes, you will need to collect and use data. This doesn't mean collecting every bit of information available to you. It means that you need to identify what data will help you make decisions, where you will find that data, how best to collect it, and what you will do with it once you have it.

> *A good rule of thumb is to only collect the data that you will use, and to use the data that you collect.*

As noted in our Planning for Evaluation module**,** during the planning phase of the evaluation cycle, you will be deciding what evaluation questions you want answered and what you will be evaluating. Do you want to improve your website? Will you be evaluating your hours of operation? Are you considering discontinuing or starting a new program? Are you planning to evaluate the impact of your services on your clients and/or the community at large? The decision is yours, but you do need to be clear, so that you can remain focused and keep your evaluation activities manageable.

At times, you may only be evaluating a specific component of your organization, in which case you will restrict data collection to sources that are relevant to that area of focus. For example, you may want to evaluate your intake procedures, your social media impact or your volunteer recruitment methods. At other times, you may be doing a broader-based, more global program evaluation, which means that you will need to collect a wider range of information. A good rule of thumb is to only collect the data that you will use, and to use the data that you collect.

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As you work through this module, you will see that there are a lot of questions to ask yourself. That is because there are no definitive right or wrong answers, since what you decide will depend on the scope of your evaluation, your organizational capacity to conduct the evaluation, and the resources available to you (including time and money). We hope that you will use these questions as a guide to help you decide what is needed for YOUR evaluation and what will work best for YOUR organization.

Before you begin collecting data for your evaluation, you will need to ask yourself some key questions, including:

- How can you make data collection manageable?
- What tools will you use?
- What information are you trying to gather?
- Who are you going to ask?
- What are you going to research?

Asking yourself questions ahead of time can help save you time and keep you focused. By planning ahead, you can identify the purpose of your evaluation, which in turn will help you determine what information you need to gather. This knowledge then leads to the next step: determining which stakeholders you want to involve and how you want to involve them.

The first thing to do is to plan ahead. Don't just start gathering information. Before you begin, you need to determine your evaluation focus and then gather information accordingly. Think why you are conducting an evaluation. Are you looking for statistics, demographics and other "hard" data, or are you more interested in exploring and documenting the long-term impacts of your programs and services for your clients? Perhaps you would like to compare how your partner agencies assess impact with how clients identify their own progress.

What you choose to evaluate is up to you, but be clear about what it is you are looking for so that you can, in turn, be clear about the information you will need to gather. You may not end up using everything that you collect, but don't spend time collecting data that is not at all related to what you are evaluating.

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Think about how your evaluation results will be used. Will you use the results for marketing or will you use them to try to seek increased funding or donations? Are you interested in knowing if client numbers have increased, are you wondering if your operating hours should be changed, or do you want to know how effective your marketing materials are? You can evaluate one, two, or many program components!

Setting a clear focus for your evaluation efforts is critical, so take the time to think about how much time you have to devote to evaluation and why you are evaluating. You may be required to evaluate a pilot project, for example, in order to secure additional funding so that it can continue to operate for a longer term. In that type of situation, your parameters are fairly clear. On the other hand, you might think that it's time to update your website, so you will want to know what people like and don't like about your current site, what they find useful, how they arrive at your website, what they search for when they are there, and so on. Or if you offer any type of training services, you might want to evaluate the learning materials used in order to be sure that they reflect current student needs and overall training goals.

Some of the sources of existing information you can use include (but are not limited to):

- organizational statistics
- annual reports
- funder reports
- financial statements
- project proposals
- marketing materials
- client files
- census data
- general research
- literature reviews related to best practices in your field
- environmental scans
- local labour market and social information
- website and social media analytics
- community studies
- informal feedback from conversations with stakeholder groups
- surveys and focus group data, including client surveys, staff surveys, community partner surveys and volunteer surveys

Setting a clear focus for your evaluation efforts is critical, so take the time to think about how much time you have to devote to evaluation and why you are evaluating.

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Don't panic – you won't need to review all of this information unless you are doing a comprehensive, overall organizational evaluation! The information you will need to collect and review will depend on what part(s) of your organization you are evaluating.

You may also need to go beyond existing organizational information. You should reach out to your stakeholders to get their input. Some of the people you can talk to include clients, staff, volunteers, board members, community partners, employers, social service agencies, funders and the community at large. You can reach these stakeholder groups through methods such as formal and informal surveys, interviews and focus groups, which will all be discussed in more detail further on in this module.

Again, you do not have to survey or meet with everyone in the list above. Who you consult will depend on what you are evaluating and what your organizational capacity and resources are. Some questions to consider include:

- How will you collect all of this information?
- Will you conduct personal interviews?
- Will you send out an email survey?
- Will you post evaluation questions on your website or social media channels?
- Will you track client data?
- Will you hold focus groups, either in person or online?
- Will you observe how your programs and services actually operate and record your observations?

A helpful way to keep yourself on track when thinking about the data you are collecting and from whom you will collect it, is to make note of how this relates to the purpose of the evaluation. In this way, you can eliminate some unnecessary work and make sure that you are staying focused on the purpose of your evaluation.

For more information about collecting data, be sure to visit the Community Tool Box, developed by the KU Work Group for Community Health and Development, specifically Section 5. Collecting and Analyzing Data. (This resource, while excellent, can seem daunting because it is so comprehensive. We suggest starting with the How to Use the Tool Box resource provided.)

Informal Evaluation

When making decisions about data collection, you will also need to consider the scope of your evaluation. If you are looking for feedback on one specific program component, such as your Facebook page, you may want to take a more informal approach to evaluation. In this scenario, you could seek feedback from your Facebook followers by simply posting a question or two along the lines of , *Would you like us to post more or less often?*, *Are our posts interesting?*, *What topics would you like us to post about?* You might or might not get much response, but you can use whatever input you get to make some changes. Often, this type of informal evaluation can help you make small (but significant) changes as you go along.

Informal evaluation is often done without much planning and on an ad hoc basis – that is why it is called informal! When you think about it, people who work in non-profit organizations are always talking about ways to do things better and making small changes and adjustments on a regular basis. Encouraging and participating in this type of ongoing, informal evaluation is all part of building a culture of evaluation within your organization!

Some other examples of informal evaluation include:

- Asking the Board of Directors to answer two simple questions about a meeting. For example, What did you like best about the meeting? What was the worst part of the meeting?
- Distributing a short volunteer survey asking questions such as: How can we provide better training? and How would you prefer to be recognized for your contributions?
- Asking staff to brainstorm a key area of the organization that needs to be evaluated
- Reviewing key organizational and/or financial data on a regular basis

Encouraging and participating in ongoing, informal evaluation is all part of building a culture of evaluation within your organization!

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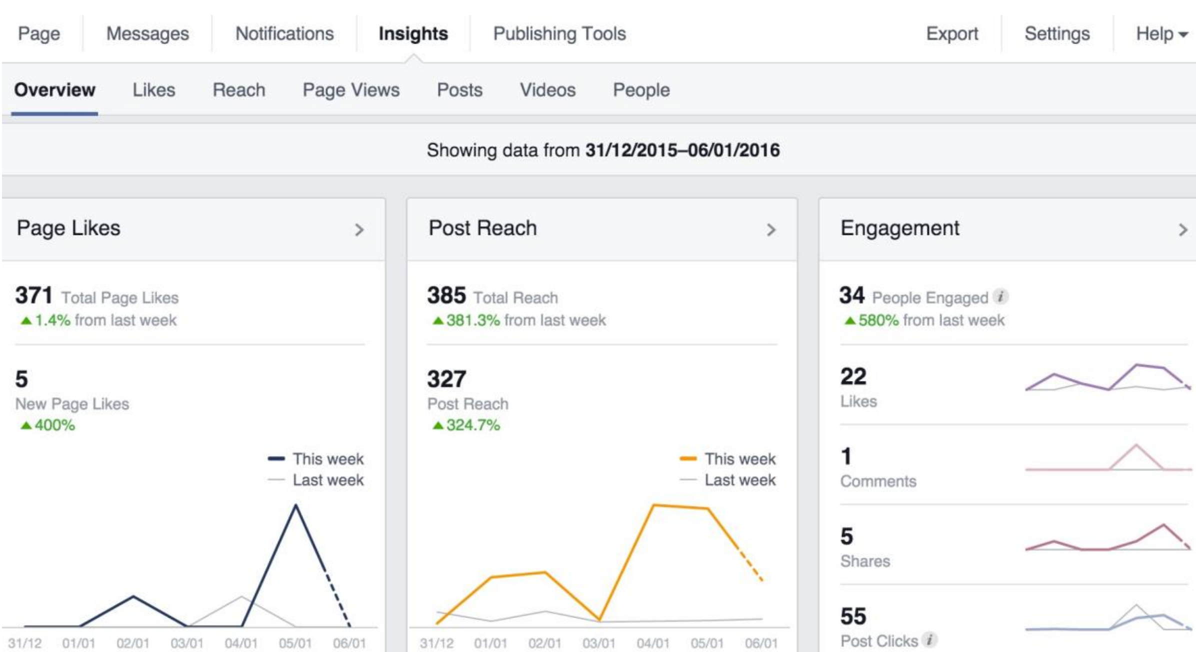
Formal Evaluation

On the other hand, there will be times when you want to be more formal in your evaluation efforts, and you will want to ensure that you are targeting the appropriate audience or stakeholders and that you hear from a specific number of them before making any changes. For example, if you are thinking about changing your hours of operation, you might want to survey both staff and your client group and set a target to receive responses from 75% of staff and 50% of clients before any changes are made.

In the previous section, we suggested asking your Facebook followers for feedback from time to time. To more formally evaluate your social media and online presence, be sure to take advantage of the excellent information that is provided through tools such as Facebook Page Insights. In the following graphic from Community Literacy of Ontario's Facebook Page Insights, you can see how much information is provided just in the overview. For example, you can see how many likes the page has, how many users your posts reached, and how many people engaged with your posts. By drilling down into specific areas using the menu at the top of the page, you can get more specific information about dates, individual posts and more.



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The following chart, adapted from Carter McNamara's [Basic Guide to Program Evaluation] and Community Literacy of Ontario's [SmartSteps to Organizational Excellence], provides a good overview of the various options for data collection and the pros and cons of each. Depending on what you are evaluating (e.g., your entire agency, a specific program, board governance, impact of your services) you may choose to use only one or several data collection methods. For example, you might choose to start with a written survey and then ask more in-depth questions via a face-to-face focus group with a small number of survey respondents.

Method	Purpose	Pros	Cons
Questionnaires, surveys, checklists. Can be online or on paper	To quickly gather a large amount of information in a non-threatening way	Effective for specific target groups Useful when you are looking for quantity Generally inexpensive to administer Anonymity (particularly with online option) Results are easy to summarize and compare (online options may have this feature built-in) Responses are not impacted by group dynamics Flexible; can be used in a variety of settings	May not provide in-depth information Wording may bias responses Can't ask for clarification or probe for further information
Interviews (group or individual)	To fully understand impressions or experiences or to	Can provide more in-depth information than a survey or	Can be time consuming

Method	Purpose	Pros	Cons
	learn more about responses to surveys/ questionnaires	questionnaire Can be used for relationship building Can be done in a variety of settings (individual, group) Can be done in person, via phone or at a distance	Data may be difficult to categorize and analyze Interviewer can bias responses
Document review/ records analysis	To gain an overall impression of how the program operates	Provides detailed and historical information Information is easily accessible Can be conducted offsite and/or outside of regular hours An important component of an overall program evaluation	Can be time-consuming Information available may be incomplete or out of date Limits evaluator to information contained in documents; doesn't let evaluator see how a program is actually implemented Provides limited scope for evaluation
Observation	To gather information about how a program actually operates, particularly about its processes.	Easy to administer Provides data about what is actually happening in the program	Requires objective observers Requires skilled observers to interpret data

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Method	Purpose	Pros	Cons
	Can be done with individual programs or with the overall agency Can be structured or unstructured	Data is reliable and verifiable Can capture "soft" data that isn't available elsewhere Helps quantify activities done on a daily basis	May be stressful for those being observed Observer may influence behaviours Can be time-consuming Confidentiality issues A single observation may not be indicative of the norm

Method	Purpose	Pros	Cons
Focus groups	To explore a topic in depth through planned, facilitated group discussion	Provides "group think" or common impressions An efficient way to gather a range and depth of information in a single session Group synergy can produce high level results Can generate ideas for further discussion More cost and time effective than individual interviews	"Group think" can bias responses Responses can be difficult to analyze Requires pre-planning and scheduling May be intimidating for some participants such as client groups Potential for facilitator bias
Case studies	To fully understand or depict a client's experiences in the program and to conduct comprehensive examination through case comparison	Powerful way to portray the program to outsiders Full depiction of the clients' experiences with all stages of programming (intake, actual programming, results, exit, etc.)	Time consuming Confidentiality issues

Asking the right questions

Once you have determined the overall purpose of your evaluation, identified the background information you need to gather, and decided which stakeholders you want to involve and how you want to involve them, you then have to develop questions that will help you achieve your evaluation goals.

As we mentioned earlier, it is important to only ask about what you need to know. So, if you aren't interested in the age of survey respondents and it has no bearing on the feedback they provide, don't ask. On the other hand, if you offer programs and services targeted to youth, then the age of survey respondents will matter. If you aren't certain, err on the side of caution so that you don't have to go back looking for additional information later. To continue with the example, by collecting information related to respondents' age, you might identify during the analysis phase that certain age groups respond differently. For more information on this next phase in the cycle, be sure to review our **Analyzing Data** module.

When drafting questions for surveys, focus groups or key informant interviews, ask yourself WHY you are asking that particular question and WHAT you will do with the answer. Will the responses provide data for future program enhancements? Will you choose to keep or delete a section of your website based on survey feedback? Not only will this help you gather information that you will use, it will also help keep your list of questions manageable. No one wants to answer an unnecessarily lengthy survey!

Whether you are conducting in-person interviews, sending out an online survey, gathering information via social media, or doing online or face-to-face focus groups, the questions you ask to gather information are critical.

When drafting questions for surveys, focus groups or key informant interviews, ask yourself WHY you are asking that particular question and WHAT you will do with the answer.

Yes/no questions can be used to gather numbers and statistics, but they can also be used to lead into more in-depth questions or to get more detailed information. For example, *Did you use any of our services in 2015?* would then lead to questions such as *Did those services help you achieve your goals?*, or *Did you have any problems accessing our services?* Similarly, you could ask, *How did our services help you achieve your goals?* , or *Please describe how our staff was helpful*, and so on.

You can also include suggested answers when you ask the questions, although this can skew the data towards those suggestions. For example, the question *Did you have any problems accessing our services such as the website not working or the telephone not being answered?* might encourage respondents to only choose from the selections provided and not give other responses that aren't included. If you do provide some possible responses, be sure to include as many choices as possible along with an option for "other" so people can add things you didn't think of.

Another option is to use a rating system. This could include choices such as "strongly agree, somewhat agree, somewhat disagree and strongly disagree". You could also add a "neutral/don't know" option, but you will have to decide if you want respondents to make a specific choice or if "neutral" responses are appropriate. Similarly, you can use a numbering system so people can choose their response on a scale (i.e., 1 to 5, or 1 to 10).

If you are trying to measure organizational impacts, ask questions relating to outcomes and impacts. For example, *How did the information on our website encourage you to contact us? or How did the skills you learned during your time with us help you find a job?* Asking "how did …." can help you avoid yes/no responses.

Finally, you need to think about how to order your questions. Sometimes, survey respondents get interrupted or even bored when completing a survey, so be sure to ask the most important questions at the beginning. Leave the demographic information to the end, unless it is essential that you collect it.

Before sending out your questions in an online survey or beginning to interview stakeholders, it is a good idea to field test your questions to be sure that they are clear, easy to understand, and that they do not bias responses. SurveyMonkey, the most popular online survey tool, provides some helpful tips for writing good survey questions. David Charest's Constant Contact blog entry, 8 Tips for Writing Effective Survey Questions, is also helpful. We have also provided some sample questions at the end of this module.

Focus Groups

Focus groups can be an excellent way to gather information about your organization and its services. They can be conducted with any stakeholder group – clients, staff, volunteers, employers, social service agencies, the community at large, and even funders. Focus groups can provide rich data because people discuss issues and explore them more deeply than they might in a written survey or during a one-on-one interview. However, focus groups can also bring about "group think" where people get swept up in the tide of opinion, which can skew data.

Focus groups can provide valuable data about questions that might be difficult to answer on a written survey. For example, if you are considering starting a new program or service, you might want to ask your potential client group if they would be interested in using the new service. A written survey may indicate a level of interest, but it can't tell you why or why not people are interested, nor is it likely to tell you how your idea might be improved upon or implemented. A focus group could allow you to discuss a variety of options in depth, and you may hear ideas you hadn't previously considered.

Focus groups can be standalone activities or they can be used to supplement a questionnaire or survey, such as in the example above. Focus groups can be held in a face-to-face setting, in "real time" online using tools such as GoToMeeting, Google Hangouts, or even during a TweetChat or in a Facebook group.

A focus group should not be a free-for-all event. It should be a structured group activity with pre-determined questions and time limits. The facilitator should not sway opinion or influence the direction of the discussion, unless it goes off track. He or she should also not let one or two people dominate the discussion.

It is a good idea to have someone designated as a note taker for focus groups, or to record the session, if all participants agree. As the facilitator, you will be busy answering questions, listening to responses and managing time limits. The notes and/or recordings from the focus group will be critical when it comes time to analyze your evaluation data. Alternatively, you can have someone assigned as a scribe to take notes on a flip chart or a SmartBoard during the session.

The Community Toolbox from the Work Group for Community Health and Development at the University of Kansas has some excellent suggestions and "how-tos" for conducting focus groups. It's well worth a read!

Surveys

Surveys can be done one-on-one with individuals over the phone, in person, or online. They can also be completed anonymously online or on paper. Survey Monkey is probably the most popular online survey tool available today, and it is free for up to ten questions and 100 responses. Paid versions of Survey Monkey and other online survey tools can help analyze and categorize responses. This blog entry from Megan Marrs describes the features and benefits of seven different survey tools and can help you choose what is right for your needs.

When it comes to surveys, it is important to remember that many people in non-profit agencies are called upon to answer surveys frequently, so don't overburden them. In fact, research for this project found that many small non-profit organizations in Ontario indicated that they and their stakeholders are experiencing extreme survey fatigue! Keep your survey questions to a minimum (even just two or three) and keep them focused only on the information you need to gather. Once again, taking the time to field test your survey can help you avoid repetitive or unclear questions.

You can also make it easier for people to answer surveys by putting them online or in an easily accessible location in your office. Consider using an incentive, such as a prize, to encourage responses, if appropriate.

Key Informant Interviews

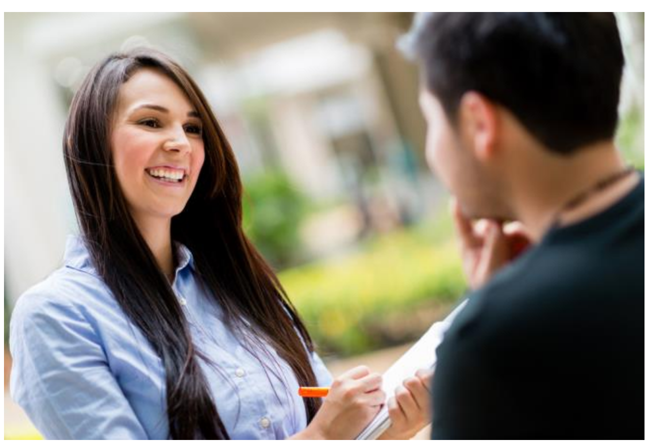
Sometimes called key informant surveys, these discussions with stakeholders who can provide information relevant to your evaluation are extremely valuable. You can conduct these interviews in person, on the phone or online. These interviews let you explore topics in greater depth than a survey or questionnaire on its own.

Key informant interviews should be structured discussions and should reflect any other surveys or forum group discussions that you are conducting. It is helpful to provide the key informants with the questions you will be discussing ahead of time, so that they can think about their responses.

Choosing who to interview is important. You will want to choose people with a good knowledge of your organization and its programs and services, or with expert knowledge about the services you provide. For example, if you are evaluating the volunteer component of your organization, you will want to interview some experienced volunteers, the volunteer coordinator and possibly some clients who work with the volunteers. You should also interview people who are newer to the organization so that their perspective is included to balance out that of the long-term volunteers.

As well, you may also want to interview volunteers and volunteer coordinators from other organizations to gather ideas and to help you evaluate your processes. When choosing key informants, think about why you want to interview that particular person and how their input can benefit your evaluation efforts.

You can learn more about key informant interviews from this helpful resource, Using Key Informant Interviews, from the University of Illinois, and from the Better Evaluation blog.



Other Ways to Gather Data

Along with interviews, surveys and focus groups, you can gather data in other ways. For example, an excellent way to hear from your stakeholders on an ongoing basis is to have a suggestion box that is readily available at your office and to encourage people to use it. You could also add a suggestion box link to your website.

Additionally, you should be taking note of any suggestions or concerns that you see in your social media feeds. In today's world, many people use social media to reach out to organizations to let them know what they think. While you are at it, don't forget to review your social media analytics to regularly evaluate who is connecting with you online. Are you gaining new followers and where are they coming from? Are people interacting with your posts and tweets and in what way? Are there particular topics that are more popular than others? All of this information can help you improve your social media efforts. For some great ideas on how to use social media, be sure to visit Community Literacy of Ontario's Social Media Marketing modules.

If you have the budget and/or the capacity to conduct a large-scale evaluation, it can be very beneficial to bring in outside observers as part of your evaluation. These observers will spend time in your organization and can analyze any component of your work from processes, programming and policies to staff/client interactions. This can be very beneficial in terms of providing an unbiased point of view. This type of intensive evaluation can be extremely valuable, although it is a significant undertaking that would likely require additional funding.

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Factors that Influence Data

Whether you are conducting a focus group, tweeting out a survey, observing programming or holding key informant interviews, you need to set some targets.

To get started, you need to determine which stakeholder groups you want to hear from. Depending on what you are evaluating, that might be clients, staff, volunteers, funders, other agencies and the community at large, or it might be just one stakeholder group. How many individuals or organizations do you want input from? Everyone, or a select few, or a certain percentage? If you are making significant changes to your programs or services based on stakeholder feedback, you will want to ensure that you have enough input to substantiate those changes – hearing from only five out of 500 hundred clients isn't enough! You want to make sure that you set targets that are achievable and manageable, but you also have to obtain enough responses that your evaluation findings can be validated.

Be honest when sharing your results.

Be honest when sharing your results. If you are able to report that "100% of respondents said our services are excellent", but you only received five out of 500 surveys, be sure to indicate those numbers. Statistics can tell a valuable story, but they should tell the full story. Organizations such as Creative Research Systems offer valuable tools, such as the Sample Size Calculator that can help you calculate statistical significance and reliability of your data.

It is also important to consider potential bias and to try to avoid it. For example, if you have had difficult relationships with a certain stakeholder group, it might be tempting to leave them out of your evaluation process, but you can't just seek out positive reviews. When selecting who to survey and what questions to ask, you should try to avoid bias. You should always be prepared to receive some negative feedback. Gathering evaluation data is not just about finding out about the good work you do and giving yourself a pat on the back. It is also about finding out what isn't working well so that you can improve upon it.

Confidentiality can also play a role in evaluation feedback. When conducting focus groups and personal interviews, or when seeking input via social media, you know who is providing input. Sometimes people are hesitant to provide negative feedback when they can be identified and as a result, they may be afraid to provide honest feedback. Do your best to encourage stakeholders to be as honest and open as possible, and assure them that there will be no reprisals or consequences for providing negative feedback. Of course, you will also want to ensure that all contact information is kept confidential and that when the data is pulled together that it is aggregate data and that no specific comments are attributable to any one person or organization.

In a small organization, confidentiality might be a concern because everyone knows everyone. You might also run into issues with survey, focus group and interview respondents not feeling free to say what they really think because they know the interviewer or other organizational staff so well. In this type of situation, you can consider bringing in an outside party to conduct interviews or focus groups. This doesn't have to cost money if it is not in your budget. Perhaps another community organization is also conducting some evaluation activities, and you can arrange with them to host your focus groups and you will host theirs. University students who are taking courses in research design and analysis may be looking for practical experience and might be available as volunteers.

Your data must be valid. When you conduct surveys, focus groups or interviews, it is essential that you stick with your original set of questions and that you ask the same questions to everyone. If you change your questions throughout the process, you won't have "apples to apples" comparison data when analyzing your survey or focus group results, which may make your findings invalid. Doing some field testing before sending out your surveys or holding a focus group can help you determine ahead of time if there are questions that might need to be reworded.

Often, evaluation is understood to be very agency-specific. You are trying to find out what your organization is doing well and what it needs to work on. However, most organizations don't operate in a vacuum. Even if your organization is the only one of its kind in town, there are other, similar organizations in the next town or elsewhere in the region or province. How do your organizational evaluation results compare to theirs? Should you care?

Increasingly, yes you should. For all of the same reasons that evaluation is becoming more and more critical (less funding available and increased competition for the funding that is available, for example), your organization's performance in comparison to that of similar organizations – a concept more commonly known as benchmarking – is something that all organizations should have on their radar.

For example, perhaps your organization serves 75 clients each year. It serves those clients very well, and they achieve excellent outcomes. However, if there are other organizations that do similar work to yours and achieve similar outcomes with the same amount of funding, but they serve 150 clients each year, what might that mean for your organization?

As a starting point, small non-profits should ask themselves:

- Are there other organizations locally, regionally, provincially or nationally that provide similar services to ours?
- How does our organization compare to these other organizations in terms of clients served and outcomes achieved to these other organizations?
- Are there existing metrics that need to be considered?

One of the benefits to considering benchmarking is to ensure that your organization does not suffer from tunnel vision and loses focus on the measures that matter most to stakeholders (funders, clients, staff, volunteers, partner agencies, the community).

Often, benchmarks are confused with targets. They can be one and the same, but frequently benchmarks are used to set targets. In the example above, if you know that organizations similar to yours are serving 150 clients each year and you are only serving 75, you may decide that your new target for the next year will be 85 clients to bring you closer to the standard benchmark.

For more ideas on the factors that influence evaluation, be sure to visit our **Trends in Evaluation** module where we share information and resources on the ethics of evaluation.

Analyzing and Using the Information

People who work for non-profit organizations are busy. Their focus is on the services they provide for their clients, not on paperwork and bureaucracy. While evaluation is essential to be able to continue to provide excellent client services, it should not take away from those services. Evaluation is not just a data-collection exercise – you have to do something with the information that you gather.

The first thing to do is to review the data that you have collected. You will want to know if it is complete or if you are missing anything. Consider whether you asked a consistent set of questions and if you asked the right stakeholders. Does the data you collected meet your evaluation goals and answer the questions you asked? If not, you will have to go back and gather more data.

You will want to organize the data you have collected into qualitative and quantitative sections. Quantitative data provides you with numbers. It is useful when reporting on how many clients you have, how many new clients you recruited, how many people preferred one choice over another, and so on. Qualitative data is more in-depth and measures responses gathered from interviews, focus groups and surveys. Qualitative data can provide a wealth of rich, in-depth information that can inform your evaluation results and help you plan for improvements and changes. This type of data is particularly important when evaluating your organization’s impacts.

The final step is the most important. You have to act on your findings!

Once your data is collected and organized, you need to make sense of it. Depending on your evaluation goals, you may want to write up a formal report to present to the Board of Directors, or you may prepare an annual plan to implement changes. You may decide to share the data at your monthly staff meeting to engage staff with the evaluation process and results, and to encourage a culture of evaluation. If you are releasing your findings to the broader public, you might want to be more creative with your reporting, such as creating a video or an infographic. You might also want to create a brief, overview summary that can be shared via your website, on a marketing flyer or on your social media profiles.

The final step is the most important. You have to act on your findings! There is no point evaluating if you aren't going to do anything about what you discover. This doesn't have to mean an entire reorganization of your program. It can be a logistical change, such as opening a half hour earlier in the morning or sending out meeting agendas earlier. Of course, if you conducted a full-scale, comprehensive program evaluation, it could also mean bigger changes, such as rewriting staff job descriptions or creating new programming.

We will discuss analyzing the data and taking action in much more detail in the **Analyzing Data** and **Taking Action** modules.

Conclusion

Evaluation is a multi-step process that includes planning, collecting data and information, analysis, action and communication. Whether you are conducting a large scale evaluation or evaluating just a small component of your organization, and whether your evaluation is formal or informal, each of the steps in the cycle is important for a successful outcome. You need to gather the right information, from the right people, to reach your evaluation goals and to find answers to the questions you are seeking.

When done correctly, data collection is the basis to a useful, practical evaluation effort that can provide you with the information you need to make your programming and services even better than they already are! Whether it's hearing from your Twitter followers about their favourite Tweet or conducting a full-scale organizational evaluation, effective data collection will help you identify what you do well and what needs improvement so that you can make informed decisions as you move forward.

For small non-profit organizations, finding the time to collect data can be challenging. However, it is of critical importance to the success of your organization. Data collection allows you to gather the information you will need during the analysis stage of your evaluation when you will make informed decisions, based on evidence, about your organization's future. For more information about what to do with the data you have collected, be sure to read our **Analyzing Data** module.

We hope that this module has provided guidance and support for your data collection efforts. You can continue the conversation on evaluation in non-profit organizations in other ways, too! For example,

- During the life of the **Developing a Culture of Evaluation** project (it ends in March 2017), visit our website to join our online discussion group, or to find out how to participate in an online clinic and/or webinar.
- Stay connected with the Ontario Nonprofit Network, Imagine Canada, and other organizations with an expertise in non-profit evaluation.
- Participate in conversations about evaluation in non-profits in your community. Talk to your fellow non-profit organizations, your volunteers, your Board of Directors, your funders, your donors and community members.
- Share your thoughts with us via our Facebook page or on Twitter.

DEVELOPING a CULTURE of EVALUATION

Sample Questions

In this section, we share some sample questions that you can use to begin to gather data for your evaluation. Remember that the questions suggested are just samples – you will need to add different or more specific questions based on what part of your organization you are evaluating and who you are asking. Any of the sample questions can be used in a survey, a one-on-one interview, or a focus group. You can use one, several or all of the sections.

Survey of Community Partners

Do you ever refer potential clients to our organization?

- Yes
- No
- Don't know

How would you rate your knowledge of our organization?

- Minimal
- Moderate
- Excellent

How would you like to learn more about our organization?
(You can choose more than one response)

- I don't need more information
- Through a website
- Via social media
- Via email
- Please contact me by phone
- I will visit the agency
- I would like to set up a meeting
- Other ______________________________________

What type of information would you like about our agency?

____

What do you like best about our agency and its programs?

____

How do you think we could improve our agency and its programs?

____

Does our agency help your clients meet their goals? How?

____

What else would you like to tell us about our organization?

____

Client Evaluation Survey

This tool can help gather feedback from your client group. You can add or change the questions, depending on what you are evaluating. For example, if you are surveying previous clients, you might want to ask them how your programs and/or services have made a difference in their lives. If you follow up with clients after they have left your organization, you might want to ask about the best way to reach them (email, social media, phone calls, etc.)

Basic client questions could include:

How did you learn about our organization?

- From a website
- On social media (Facebook, Twitter, Instagram, etc.)
- In an email
- From a poster
- On the radio
- From a friend
- From another organization
- Other: ___________________________________

Do any of the following make it difficult for you to attend our programs or to use our services?

- Child care
- Family responsibilities
- Work responsibilities
- School responsibilities
- Transportation
- Our location
- Our hours of service
- Other:
- I am not experiencing any difficulties

If you have run into problems attending our programs or using our services, how were these problems solved?

____

How do you think we could make it easier for people to attend our programs and use our services?

____

Did you meet your goals? (The wording of this question should be tailored to reflect the programs and services your organization offers.)

____

Would you recommend our organization to others? Why or why not?

____

Internal Evaluation Checklist

This section can be used to help review what is already in place in your organization and what areas may need improvement. It is not an exhaustive checklist; you may choose to add specific requirements that reflect your organization's programs, services and operating procedures.

- We have an up-to-date mission statement
- Our programming activities and services reflect our mission statement
- We have policies and procedures in place which are followed and reviewed regularly
- We have written job descriptions for all staff that reflect the actual duties of each staff position
- We have financial policies and procedures in place that are followed and reviewed regularly
- We maintain accurate records for all clients
- We respect and maintain client confidentiality at all times
- We have a volunteer recruitment and screening process in place

Staff Satisfaction Survey

This section can be used with staff to get their input during the evaluation process. Sometimes, we forget to ask staff what they think! Again, you will want to create questions that reflect your workplace.

- Hiring practices are fair and equitable
- Employment standards are adhered to
- Staff are treated as valuable members of the organization
- Salary and wage levels are communicated clearly and are adhered to
- The human resources policy is updated regularly and adhered to.
- The human resources policy is provided to all new staff members when hired and to existing staff members when it is revised.

Volunteer Satisfaction Survey

If your organization uses volunteers, you will want to seek their input as well. Some suggested questions include:

- Volunteers are treated as valuable members of the organization
- Volunteers' responsibilities are clearly communicated
- Volunteers receive regular recognition
- Clients are aware that some services are provided by volunteers
- Volunteers have written job descriptions

Board Satisfaction Survey

If you have a Board of Directors, it is important to include their input in the evaluation process.

- Written position descriptions are available for directors and executive members of the board
- Board members are treated as valuable members of the organization
- Board members understand their role (this should be tailored depending on the
- type of board governance structure that is in place)
- Board meetings are effective and efficient
- Board minutes are produced in a timely manner
- Board minutes are accurate
- Board members are involved in various aspects of the organization as appropriate (fundraising, public relations)

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Data Collection Checklist/Template

So now you're ready to start collecting data for your evaluation! We have created this handy checklist that you can use to help you get started.

Our evaluation goals are:

1.____

2.____

3.____

We will need to get input from:

- ○ Clients
- ○ Staff
- ○ Board members
- ○ Volunteers
- ○ Community members
- ○ Partner organizations
- ○ Other community organizations
- ○ Local businesses
- ○ Other

Collecting Data

We will use the following data collection tools to help us obtain the input we need to conduct our evaluation:

- Print surveys
- Online surveys
- Face-to-face focus groups
- Online focus groups
- Key informant interviews
- Social media analytics
- Website analytics
- Informal conversations
- Social media feedback
- Observation
- Suggestion box
- Review of organizational documents and data (statistics, financial statements, client files, etc.)
- Other

Who will collect data?

- Staff members
- Volunteers
- Board members
- Paid consultant/contractor
- Other

When will we do this?

(Set a deadline for each activity.)

Collecting Data

You might also want to set up a chart once you have made these decisions, to help you keep track. It could look something like this:

Evaluation Plan: Data Collection		
Who	**What**	**When**
Executive Director	Conduct board focus group at monthly meeting	March 12
Volunteer Coordinator	Create and distribute online volunteer feedback survey	March 20
Executive Director	Conduct online focus group with partner organizations	March 18
Community Workers	Provide paper survey during client visits (survey will also include link to online survey option); collect surveys during client visits	April 30
Communications Manager	Gather social media and website analytics Ask social media followers for input	March 30
Board Chair	Review policies and procedures manual	April 30

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Additional Resources

Community Tool Box. (Chapter 3, Section 6. Conducting Focus Groups). Work Group for Community Health and Development at the University of Kansas, 2015.

Creating and Implementing a Data Collection Plan. (an e-learning lesson)

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Emery, Ann K. How Do You Visualize Evaluation? From the Data Analysis and Visualization blog, January 8, 2013.

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McNamara, Carter. Basic Guide to Program Evaluation (Including Outcomes Evaluation)

Measuring Outcomes, part of the Strengthening Nonprofits: A Capacity Builder's Resource Library collection. National Resource Centre, 2010.

Trottier, Vicki and Jette Cosburn. The ABCs of CIPMS (Continuous Improvement Performance Management System). Community Literacy of Ontario, 2008.

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DEVELOPING a CULTURE of EVALUATION

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COMMUNITY LITERACY OF ONTARIO

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Ontario

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