Introduction to Evaluation

Introduction

"Evaluation is the one area that we don't spend a significant amount of time on, but it's the thing that's most important."
(Quote from a project research participant)

Welcome to the **Introduction to Evaluation** 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

Introduction to Evaluation

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!

Overview of the Introduction to Evaluation Module

This **Introduction to Evaluation** module will explore the reasons for evaluation, as well as discuss creating a culture of evaluation and why that is important. Theory of Change and Logic Models will be introduced, and we will provide a brief overview of three common types of evaluation. Finally, as with all of the modules in the series, we have included some additional resources that you will find helpful for further exploring the topic of evaluation.

Module

Overview

This module is not intended to be a "how to" guide. Instead, it will give you ideas and suggestions for how to think about and incorporate a culture of evaluation 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.

Introduction to Evaluation

What is Evaluation?

Evaluation is used to help organizations make critical decisions and to take appropriate action. The evaluation process itself is not the decision: rather it is the process of gathering and analyzing information in order to make an informed decision. The decision-making and any actions that result from evaluation do, however, form part of an overall, continuous evaluation cycle, as shown below.

Why Evaluate?

There are a number of reasons to evaluate. All too often, evaluation is seen as a necessary evil that allows an organization to meet their funding requirements. However, evaluation is important for many reasons and is an essential element of good organizational management. It shouldn't be something that you do just because you have to, but rather it should be something that you do because it can make a difference – for your organization, for your clients, and for your community.

Evaluation allows you to:

Assess organizational needs and plan service delivery

If you are planning to conduct a needs assessment or to introduce a new delivery component for your organization, you will need specific information. Evaluation can help you identify information about the existing level of services, the availability of resources and the importance to your client group and/or community of a potential new service. You can then use this information to plan for implementation. You can also use it as the basis to apply for funding. Along with assessing the need, your evaluation can also identify other similar programming or services that already exist or any gaps in service.

Monitor implementation and progress of new and ongoing initiatives and services

Once a new service or initiative has been implemented, it must be monitored to ensure that it is performing as planned. During the monitoring phase, you might decide to make changes to your original plans based on information that you gather once the new service or initiative is up and running. This is a perfect example of the ongoing nature of evaluation!

Solve Problems

Implementation and operation of any part of your organization's activities can be hindered by unexpected issues or problems. This can include things like low staff morale, financial problems or administrative errors. In these types of situations, evaluation can help identify just what the problem or issue is, why there is a problem and possible solutions.

Introduction to Evaluation

Understand and assess the results your organization has achieved, particularly the impacts it has made

Evaluation is often done for the purpose of assessing organizational impacts, including client results and achievements. This can help you identify if the organization and its clients are achieving their stated goals. The information gathered during this type of evaluation can be used to make decisions about continuing to offer a particular service, or whether to modify it or even to discontinue it.

Improve services and operations by identifying what you do well and what needs improvement

Evaluation that focuses on improvement is often done when an organization feels that some or all of its services and programming need a change. For example, your annual statistics might begin to show that client numbers are decreasing, and you would like to know why and what you might do about it. There can definitely be a crossover between this evaluation focus and the one above, i.e., “assess results and impacts”. This type of evaluation is also useful when the focus is on operational aspects of your organization.

Evaluation can lead to positive change in your organization, but it could also mean that you discontinue or significantly alter a service if your findings indicate that it isn’t working the way it should or that it isn’t having the desired impact and outcomes.

Prove successful outcomes to funders, donors, clients and other stakeholders

Most, if not all, non-profit funding requires recipient organizations to conduct some type of evaluation in order to receive the funding. Beyond these requirements, however, evaluation can provide your organization with data to prove that it is making an impact and achieving results. This information can then be shared with some or all of your stakeholders in the form of social media posts, annual reports, success stories and more. To learn more about effective ways to communicate your successes and achievements, be sure to see our **Communicating the Results** module.

Introduction to Evaluation

During the research phase of the **Developing a Culture of Evaluation** project, we asked non-profit organizations why they think evaluation is important. They provided us with a long list of excellent reasons, including:

- To identify successes
- To identify gaps and focus on areas for improvement
- To provide consistency and transparency
- To look at and assess trends over time
- To increase creditability with external stakeholders
- To prove to funders the value of new projects, and our ability and capacity to manage new projects and funding
- To identify what we should be focusing on and to better meet community needs
- To allow us to be more informed and responsive in decision making
- To gain insight as to how we are seen by others

Introduction to Evaluation

Developing a Culture of Evaluation

We want to emphasize the importance of evaluation being an integral part of your organizational culture rather than a one-time activity or something that is done only when absolutely necessary. A culture of evaluation means that you have support, understanding of, and buy-in for evaluation throughout your organization. It means that evaluation isn't a one-off activity done only when certain staff members are assigned to do it.

Evaluation is an important component of overall organizational management. After all, how do you know what you do well and what areas need improvement if you don't evaluate? But don't panic – evaluation doesn't have to be an onerous task. You can, of course, choose to do a comprehensive overall organizational evaluation, but you can also evaluate individual programs and services that you offer, or specific components of your organization, such as your volunteer program or your social media marketing. The choice is up to you, but we suggest starting small and then getting more adventurous as you gain skills and experience.

As you become more familiar and comfortable with the evaluation process, it will become part of your annual management cycle and part of your overall organizational culture. It is important that you have an evaluation plan, even if it is a modest one or if it will take several years to complete.

Evaluation is important for many reasons. As we have just mentioned, it is an essential way for you to measure your successes and identify things that could be done better. One area that is extremely important to measure is your organizational impact. Are your clients achieving the outcomes that they expect to achieve? Is your organization making a difference in your community? Being able to answer these and other evaluation questions can help you to secure funding, improve your marketing efforts, enhance client and volunteer recruitment, make improvements to your services, and more.

We want to emphasize the importance of evaluation being an integral part of your organizational culture rather than a one-time activity or something that is done only when absolutely necessary.

You can also evaluate things that, on the surface, may not appear to relate to organizational impact, but actually do. For example, you might gather some information about your hours of operation and discover that clients would appreciate evening hours. Acting on this information might then increase client participation and satisfaction, which could in turn bring about greater client success.

You may also be required to report on your evaluation efforts and results as a condition of receiving funding. Whether you are getting annual funding or funding for a special project, the funding body will want to know how you know that the money was well spent, that you did what you said you would do, and that there were tangible results and outcomes.

It’s not just funders that want to know what your organization has achieved and its impacts. Other stakeholders want to know too. For example, potential clients will want to know if your programs and services will help them achieve their goals. Volunteers will want to know if signing up with your organization will be a rewarding experience. The Board of Directors will want to know if the decisions they have made regarding organizational direction were good decisions. Staff members will want to know if their efforts are resulting in success. Donors and supporters will want to know that their contributions have been used to bring about results and positive change.

So, you know that evaluation is important … but how do you encourage a culture of evaluation in your organization? It might not be as hard as you think. You are probably already informally evaluating quite often. Do you find yourself chatting with your co-workers about what is and isn’t working in that new service you have just started offering? Do you talk to volunteers about whether the training you provide helps them in their work with clients? Does your Board of Directors do a quick go-around after a meeting to see if everyone is satisfied with how it went? Do you take a look at your Facebook Insights or Google Analytics to see if your online marketing efforts are reaching new audiences? All of these quick check-ins are examples of informal evaluation and a sign that your organization is developing a culture of evaluation.

The next step is to move from the informal to the formal and become more deliberate in your evaluation activities. As the saying goes, “talk is cheap”. So while you might frequently discuss what is and isn’t working at your organization, you also need to make some decisions based on that information and then take action to bring about positive change.

Start to create an evaluation plan by deciding what you will be evaluating and why. For example, you might want to know if your online marketing efforts are helping you to recruit new clients. You might wonder if your staff turnover rates have increased or decreased. Or, you might want to identify how your organization is making positive impacts in your community. As part of your plan, you will need to identify:

- The data you need and how you will collect it
- Who you will collect data from
- The right questions to ask to gather the information you need to make decisions (for example, if you are considering a change in operating hours, ask questions related to transportation options, childcare, convenience, daily schedules and so on)
- Who you will report your evaluation findings to, and how
- What you will do about what you discover during the evaluation
- What works for others when it comes to evaluation (best practices)

Fortunately, other modules in our **Developing a Culture of Evaluation** series can help you with all of these areas! Be sure to see our **Planning for Evaluation**, **Collecting Data**, **Analyzing Data**, **Taking Action**, **Communicating the Results**, and **Trends in Evaluation** modules for detailed how-to tips, ideas and resources.

It is important to note that a culture of evaluation isn't just about doing the evaluation, however. It is also about using what you discover during your evaluation to make changes, if needed, and to inform your decisions moving forward. Evaluation results shouldn't just sit in a report that gets put on a shelf or attached to an email that no one ever opens. They should form the basis of decisions to help your organization move forward and be the best that it can be.

The following list can help you identify if you are on your way to developing a culture of evaluation in your organization:

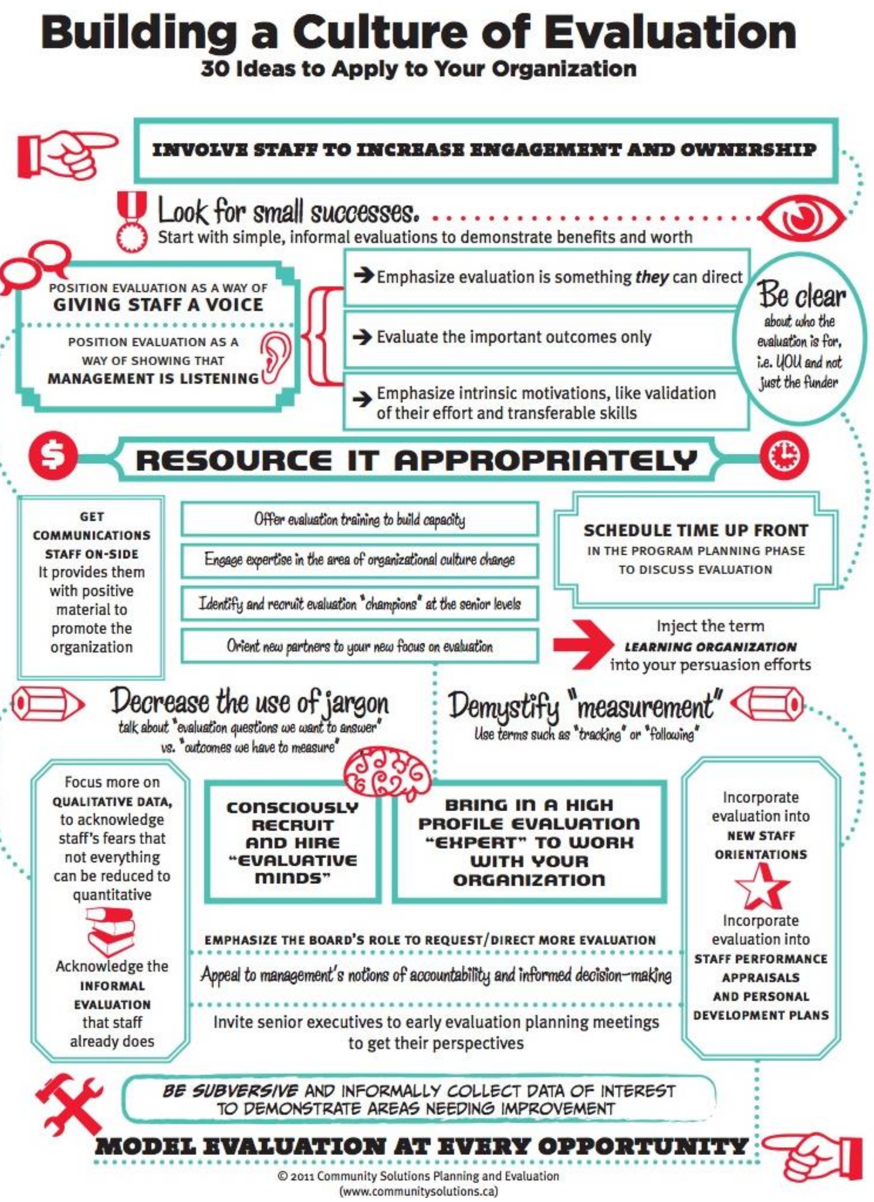
- You engage in self-reflection and self-examination. You conduct evaluation, both informal and formal, and use what you find to make decisions.
- You learn from your mistakes and you make changes accordingly
- You take calculated risks, and you try new ways of doing things.
- You value the evidence you discover and use it to make changes and improvements
- You share what you have learned with your stakeholders and explain how it informs decision-making
- You include stakeholders during all phases of the evaluation cycle
- You recognize that there is a cycle of evaluation and that you are always at some point along the continuum

You might also want to create a checklist template to share with your Board of Directors, staff, volunteers and other interested stakeholders to help determine if your organization is on its way to embracing a culture of evaluation. Below is a sample template that you can start with, but feel free to add your own ideas.

You could also add another column to show the evidence for why you checked off “yes”, “no”, or “working on it” and use the chart as a tool to evaluate your organizational culture of evaluation. You could then take it one step further and add yet another column to include an action plan for making change and enhancing the growing evaluation culture in your organization.

Building a Culture of Evaluation	Yes	No	Working on it
Do staff, volunteers, clients and the Board agree on our organizational mission, goals, services and/or initiatives?			
Do staff, volunteers, clients and Board members understand the purpose of evaluation and the benefits that evaluation can bring?			
Are staff, volunteers, clients and Board members involved in evaluation activities?			
Evaluation provides useful information that we use to inform decisions and implement change as needed			
Do our stakeholders believe that their ideas and input are valued and respected and listened to?			
Do we currently have the capacity to conduct small evaluation projects and initiatives?			
Do we currently have the capacity to conduct large evaluation projects?			
Are staff members willing to take risks and try new ways of doing things or support new initiatives?			
Do stakeholders demonstrate excitement and energy when it comes to change and innovation?			

Here is a helpful diagram from [Community Solutions Planning and Evaluation]() with 30 ideas to help you build a culture of evaluation in your organization.*



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Evaluation often brings about change, and many of us are reluctant to make change. However, if nothing was ever challenged or changed, there would be no progress and no improvement. In the next section of the module, we will look at the Theory of Change.

Theory of Change and Logic Models

"Small organizations are doing the same significant work that larger organizations are doing."

(Quote from a project research participant)

What is it that most non-profits, including those that are smaller, are trying to do? While there are thousands of non-profits in Ontario, it's safe to say that the vast majority of them have been created to make some sort of change – for people, for animals, for the environment, etc.

It's surprising then that a relatively small number of these organizations actively and regularly plan, collect data and evaluate the extent to which the desired change has happened. Enter "Logic Models" and "Theories of Change" – both terms to describe the evaluative work that non-profits do/are expected to do.Many non-profits are familiar with the term "Logic Model", but probably fewer have heard the term "Theory of Change". If you don't dive too deeply into evaluation, you may use these terms interchangeably. Both a Logic Model and a Theory of Change are visual representations of the change that you, as a non-profit organization, are trying to bring about and some of the steps you will need to take in order to get there.

In order to develop both a Logic Model and a Theory of Change, organizations need to agree upon, and be clear about, what they are trying to achieve (the change they hope to bring about) and then "back up" to identify and document what needs to happen in order to achieve the change. It may sound strange, but due to frantic schedules, high demand for our services, and limited resources, it is more common for non-profits to think about their everyday activities and less common for them to think about the change they are trying to bring about.

There are, however, some subtle but important distinctions between Logic Models and Theories of Change. Here we will describe both terms, show what they look like in operation, and then illustrate how they differ from one another.

Introduction to Evaluation

Logic Models clearly describe the outcomes you are trying to achieve and then ensure that organizations plan backwards from the outcomes to identify inputs (resources), activities that will be undertaken, anticipated outputs and expected short, intermediate and long-term outcomes. A basic logic model chart could look like this:

Inputs	Activities	Outputs	Short-term Outcomes	Intermediate Outcomes	Long-term Outcomes
	•	•			

The extent of the outcomes to be achieved can vary considerably by the initiative being evaluated. For example, if you are evaluating a short-term service or special project, then tracking long-term or even intermediate outcomes may not make sense. However, if you're evaluating a long-term service or intervention, then it does make sense to expect long-term outcomes.

Let's talk about an example of a 12-week after-school program for children that has been designed to build engagement/interest in learning and increase reading scores. As the program is only 12 weeks in length, we don't anticipate long-term outcomes, so our example will focus on short-term and intermediate outcomes.

Inputs	Activities	Outputs	Short-term Outcomes	Intermediate Outcomes
• **Donations** • **Foundation Funding** • **Staffing** • **Snacks**	• Promote the program • Run the program two afternoons a week for 12 weeks	• 15 students start the program • 12 students complete the program • 48 hours of instruction	• Increased student interest in learning	• Increase in reading levels achieved per child

Theories of Change were created a bit later than Logic Models. While they also focus on outcomes, they go deeper to look at cause and effect (causality) and to specify underlying assumptions. The concepts of causality and the identification of underlying assumptions may sound a bit academic and beyond the capacity/desire of most small non-profits. However, even if your organization chooses not to actively document these two concepts in a chart or document, they are worth thinking about, especially if what you are trying to evaluate is more complex.

Going back to our example above, using a Theory of Change and examining causality would mean that you would document HOW the organization or specific service is intended to work. It is necessary to achieve the short-term outcomes in order to be able to achieve the intermediate outcomes. So, if a child is more interested in learning, she or he will increase his or her reading ability. There is a connection between the short-term outcome and the intermediate outcome in that the short-term outcome will lead to or cause the intermediate outcome.

A Theory of Change approach would also require you to look at assumptions. WHY do you expect this program to be successful? What research are you drawing on? Simply adding more opportunities for students to learn, if they are already struggling with reading after spending six hours a day in class, will not necessarily, in and of itself, lead to better reading scores. What will your program do that will be different? Focus on reading materials that are of interest to the children in question? Provide personalized assistance instead of a classroom-based approach? Integrate technology to increase the interest of the participants? The more you can identify and document how and why you think your initiative, program or service will work, the more likely you are to experience success.

Introduction to Evaluation

The following chart shows how the above example of a reading program for children can be documented as a Theory of Change.

Research	Assumptions upon which program is based	Inputs	Activities	Outputs	Short-term Outcomes	Intermediate Outcomes
Research shows that if you increase student interest in learning, you will increase the reading levels they achieve	Further research suggests that the increased use of technology in learning will increase student engagement. By incorporating technology and providing increased exposure to learning, students will increase their reading levels.	Donations Foundation Funding Staffing Snacks Technology	Promote the program Run the program two afternoons a week for twelve weeks	15 students start the program 12 students complete the program 48 hours of instruction	Increased student interest in learning	Increase in reading levels achieved per child

So we've talked a bit about the differences between Logic Models and Theories of Change. This chart summarizes the differences between the two:

Logic Models	Theories of Change
Representation	Critical Thinking
List of Components	Pathway of Change
Descriptive	Explanatory

If you are fairly new to evaluation, you may want to use Logic Models to start. They are an ideal approach if your goal is to share your intentions around a program or service in a visual way with other staff members or stakeholders. A Logic Model will identify the basic parts of the work you are proposing. At a staff meeting, talk about the types of services or products your organization applies. Ask staff members to research logic models and then assign them (individually or in teams) to draft a logic model for a service or product. Review the draft logic models at subsequent staff meetings – so that the entire staff can learn not just about evaluation but about how you know as an organization that you are on the right track!

However, with the emphasis on evaluation that is coming from funders, it may be necessary when you're thinking of certain services or initiatives to use a Theory of Change as the Theory of Change will go beyond the basic planning to identify the HOWs and the WHYs behind your ideas. Why do you think they will work? How will you know if they are, indeed, working? How are you drawing on what is already known about a topic?

It's worth mentioning that much of what has been identified here in the way of approaches and terminology you probably already do intuitively most of the time. Whether you choose a Logic Model or a Theory of Change approach, both approaches encourage you to actually commit to paper or document what you think you know about why a project, service or program will have a good chance of success.

The other great thing about a Logic Model or a Theory of Change is that they clearly identify what it is you hope to achieve, and they lay the groundwork for evaluation strategies and approaches, providing direction for what is to be evaluated, as well as when and how. After all, if you're not very clear on what it is you are doing, why you expect to succeed, and how you will know if you have succeeded, then you are going to struggle to develop effective evaluation methods!

You can learn more about Theories of Change and Logic Models from the following resources:

- A PowerPoint presentation created by Helene Clark and Andrea Anderson for the American Evaluation Association
- An Introduction to Theory of Change. An interview with Andrea Anderson by Erin Harris for the Harvard Family Research Project
- Developing a Logic Model or Theory of Change from the Community Tool Box created by the Work Group for Community Health and Development at the University of Kansas

Types of Evaluation

There is no one-size fits all approach to organizational evaluation. You will need to decide what type of evaluation best suits your organization's goals and needs. Whatever approach you take, remember that relevant stakeholders should be involved throughout the entire process. Your evaluation should always provide useful results that will allow you to make decisions and take action. Most importantly, your evaluation needs to be manageable and not overwhelming. Always consider your organizational capacity! So while a full-scale organizational evaluation might be beyond your means and abilities today, you could begin planning for one in the future. In the meantime, you can embark on smaller, more manageable evaluation activities.

Basically, program evaluation is the process of systematically collecting information about your organization (or a particular component or service), making decisions based on that information, and then taking appropriate action as a result of those decisions. Communicating the results of your evaluation and your action plans is also a part of the process. We have developed modules for each of the areas of evaluation with practical information, tools and resources for each.

There are many types of evaluation, but they all follow the evaluation cycle. It is beyond the scope of this module to delve into all of them, but we will focus on the three most common types:

- Goals-based
- Process-based
- Outcomes-based

1. Goals-based Evaluation

This type of evaluation answers the question, "Are we achieving our objective(s)?" It helps organizations identify if and how they are achieving what they set out to do. Again, it is important to note that this can be very broad-based or very specific to just one aspect of your organization.

Goals-based evaluation answers questions such as:

- What are our organizational goals? (for a full-scale evaluation)
- What are our operational goals?
- What are the goals for a particular service? (for example, what are the goals of our volunteer program?)
- How do we know if and when we have met our goals?
- Did we meet our goals? Why or why not?

Statistical reporting and analysis are good examples of a goals-based evaluation. For example, if your funder requires you to work with a specific number of clients or to offer a defined number of workshops, you would tally up those numbers as part of your evaluation. You would then use this information to report results to your board, your funder and your community. You would also use the statistical information to make decisions about whether to make changes to your services, whether to increase your marketing efforts or whether to make other changes that would help you better meet your goals. You may also use the information to set new goals and objectives.

2. Process-based Evaluation

This type of evaluation helps provide an understanding of **how** your organization operates. It answers questions such as:

- How do we decide what services or initiatives to offer?
- How do we best deliver our services?
- How do we train staff and/or volunteers to best deliver our services?
- How do we determine which services are best for our clients?
- How do we determine if we are the best fit to meet clients' needs?
- What are our strengths?
- How can we improve the services we offer?

3. Outcomes-based Evaluation

This type of evaluation is particularly useful when you want to demonstrate and highlight your organization's impacts. It is an in-depth process that goes beyond just identifying if specific goals have been met. It looks beyond those goals to the impact that an organization has on its clients and its community and to how that impact is measured.

During an outcomes-based evaluation, you will:

- Identify the major outcomes you want to examine
- Specify the measurable indicators that demonstrate outcome achievement
- Identify goals and goal achievement

You can find more information about these three types of evaluation at The Free Management Library's Basic Guide to Program Evaluation. We will take a closer look at how you go about getting started with evaluation in our **Planning for Evaluation** module.

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 single 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.

For more information about each step in the evaluation cycle, be sure to review the following modules:

- Planning for Evaluation
- Collecting Data
- Analyzing Data
- Taking Action
- Communicating the Results

We have also created a **Case Study** module that takes you through all of the steps in a full organizational evaluation.

Finally, don't forget to read our **Trends in Evaluation** module to keep up with how other non-profits are incorporating new technology and trends into their evaluation practices.

For small, non-profit organizations, finding the time to evaluate can be challenging. However, it is of critical importance to the success of your organization. Evaluation allows you to make informed decisions, based on evidence, about your organization's future, and to take action that will allow you to increase and demonstrate your impact.

We hope that this module has provided guidance and support for your evaluation 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 up with 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 expertise in non-profit evaluation.
- Participate in conversations about evaluation 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.

Additional Resources

Curtin, Anne Marie. Developing a Culture of Evaluation: An Annotated Review of Evaluation Resources. Community Literacy of Ontario and Literacy Link South Central, June 2015.

Evaluation & Outcomes. Nonprofit Resource Center. (links to many helpful resources)

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