Have we Made a Difference?
Measuring Evaluation Influence

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Presenters

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- Slides and tools: www.cathexisconsulting.ca/interesting
Agenda

- Welcome & introductions
- What is evaluation influence?
- Conceptual framework
- Draft tools & processes
- What we have learned (results from piloting)
- Implications for practice
- Next steps / looking forward
Workshop Objectives

- Refocus attention on the real reasons we do evaluation
- Encourage evaluators to track the influence of their work
- Identify ways of improving our toolkit for measuring evaluation influence
Introductions

- Name
- Affiliation
  - Internal or external evaluator?
- What interests you in this topic?
  - Specific goals/objectives for this workshop?
What is evaluation influence?
Q: Why do we do evaluation?
A: To improve our health care
Q: Why do we do evaluation?
A: To better protect our environment
Q: Why do we do evaluation?
A: So children can have a better start in life
Q: Why do we do evaluation?
A: To make our world a better place
How Influential is Evaluation?

- There is anecdotal evidence to support the assumption that evaluation is beneficial.
- There is relatively little empirical evidence.
- We wanted to develop tools that we could use to:
  - measure evaluation influence, and
  - test the assumption that evaluation is beneficial.
Conceptual framework for meta-evaluation
# Conceptual Framework for Meta-Evaluation

**Hierarchy of Evaluation Accountability: Evaluating Evaluation**

<table>
<thead>
<tr>
<th>7. Program and decision impacts</th>
<th>7. To what extent and in what ways was the program improved? To what extent were informed, high quality decisions made?</th>
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<tbody>
<tr>
<td>6. Practice and program change</td>
<td>6. To what extent did intended use occur? Were recommendations implemented?</td>
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<td>5. Stakeholders’ knowledge and attitude changes</td>
<td>5. What did intended users learn? How were users’ attitudes and ideas affected?</td>
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<td>3. Stakeholder participation</td>
<td>3. Who was involved? To what extent were key stakeholders and primary decision makers involved throughout?</td>
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<td>2. Evaluation activities</td>
<td>2. What data were gathered? What was the focus, the design, the analysis? What happened in the evaluation?</td>
</tr>
<tr>
<td>1. Inputs</td>
<td>1. To what extent were resources for the evaluation sufficient and well managed? Was time sufficient?</td>
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Draft tools for measuring evaluation influence
Toolkit Development

- Considerations:
  - Minimize demand on the “client”, but still engage them
  - Clients more willing to talk on the phone than to fill out a form
  - Each evaluation is unique
  - Each evaluation has different goals
  - Want tools that will improve the evaluation
  - Want to measure more tangible results than client perceptions
  - Need to be able to analyse the data in the end
- Draft tools – still being refined
Toolkit

- Five components:
  1. Client goal-setting worksheet
  2. Interim client interview
  3. Final client interview
  4. Project review & summary tools
     - Agenda for project review session
     - Project summary template
     - Project database
  5. Follow-up client interview
Overview of the Process

- **Project Starts**
  - Goal Setting
  - Project Summary

- **Midway**
  - Interim Client Interview
  - Reflection

- **Project Ends**
  - Compile/collect any info about goal achievement

- **Final client interview**

- **Project Review Session**

- **1 Year Follow-up**
  - Follow-up Client Interview
  - Update Project Summary
  - Update Database

- **Project Ends**
  - Update Project Summary
  - Enter into Database
Goal-Setting Activity

- Evaluator and client discuss why the client is doing the evaluation
- Identify key goals for the evaluation (drill down to determine the real goals)
- Categorize for easier reference later
- Think about how they might measure the achievement of the “essential” goals (optional)
Interim Client Interview

- Informal chat between evaluation project manager and client every 3 months or so
  - What’s working well, what’s not working well
  - What influence the evaluation has had so far
  - Review & revise client’s goals for the evaluation
  - Make sure the evaluation is on track to achieve the goals, and if not, then correct

- Project manager reflects on project to date
Final Client Interview

- Conducted by someone other than the evaluation project manager about a month after the evaluation finishes:
  - Typical satisfaction questions
  - Use/intended use of the evaluation findings
  - Achievement of goals
  - Unanticipated outcomes of the evaluation
  - Perceptions of interview (pilot only)
Project Review & Summary

- Agenda for evaluation team reflection meeting at the end of the project
- Project summary sheet
- Project database
Follow-up Client Interview

- Similar to the final client interview, but no satisfaction items
- One year after the evaluation is finished, or a suitable time frame depending on when goals are expected to be achieved
Making it Happen

- When we get busy, difficult to make time for this process

- Solutions:
  - Integrate into existing processes where possible
  - “Ticklers” in Outlook
  - Checklists
  - Project not “closed” until database updated and project summary completed
  - Reporting via annual reports
What We Have Learned About the Process/Tools
Lessons about the Process

- **Response Rates**
  - Previous self-administered satisfaction survey: 30% (3 out of 9)
  - Current tool: 76% (13 out of 17)

- Feedback opportunity appreciated by clients (particularly satisfaction questions)

- Helped in evaluation planning; strengthened the focus on utilization

- Gained knowledge about utilization and influence of our evaluation

- Feedback to clients is important
What We Have Learned About our Evaluations
Utilization & Influence
( Levels 5, 6, 7 )

- From Final Client Interviews (N=7)
  - 1 evaluation – not utilized
  - 5 evaluations – utilized
  - 1 evaluation – utilized & evidence of influence
  - Too early for detecting influences?
Unanticipated Influences
(Levels 5, 6, 7)

- From Final Client Interviews (N=7)
  - Positive
    - Wanted to do evaluations of other programs
    - Got staff excited about the program
    - Increased the organization’s profile in the field
  - Negative
    - Goal displacement
    - Political tension due to the timing of the evaluation
Client Satisfaction
(Level 4)

From Final Client Interviews (N=13)
(Scale: 1=poor, 2=fair, 3=good, 4=excellent)

- Understanding of the project and its context (3.5)
- Attentiveness to your needs (3.6)
- Quality of deliverables (3.2)
- Appropriateness of deliverables, for your needs (3.3)
- Timeliness (3.7)
- Accessibility of the Project Manager(s) (3.9)
- Quality of communication (3.5)
General Feedback
(Level 4)

- From Final Client Interviews (N=13)
  - Positives
    - Flexibility, flexibility, flexibility
    - Being true to the facts
    - Politically sensitive, persistent, patient, respectful
    - Participatory and collaborative approach
    - Familiarity with the organization/project
  - Negatives
    - Information needs were not originally met
    - Scoping issues
Implications for our Practice
Implications for our Practice

- Paired interviews:
  - What parts of this process would be useful in your work?
  - How would you use the information?
  - What might make it difficult for you to apply the process or tools in your work environment?
  - What might make it easier?

- Regroup and share
Next Steps
Other ways of collecting information about influence

- Follow-up studies to document changes in program perceptions/outcomes before the evaluation and after the evaluation
- Pre- & post-evaluation assessments of knowledge, capacity
- Chatting with program managers after the evaluation to find out what has been done and how it has affected the program
- Media releases / Google news searches
- Need to record all of this!
Other ways of collecting information about influence

- What other ways / opportunities are there to collect similar kinds of information in your work setting?
- Could they be incorporated into this process?
Next Steps at Cathexis

- Continue to refine tools & processes (ongoing)
- Accumulate evidence of the influence of Cathexis evaluations over time
- Continue to improve our documentation
- See if we can analyse & use the data better
- Encourage others to try the tools out, to see if they work in different contexts
- Encourage others to try different approaches
Looking Forward

- If we could measure evaluation influence more systematically and on a wider scale, what might be the benefits to:
  - Individual evaluators?
  - The evaluation community (CES, evaluators as a group)?
  - The field of evaluation (evaluation theory & practice)?
  - Evaluation clients / society at large?
- What will need to happen to make these benefits possible?