

Have we Made a Difference? Measuring Evaluation Influence

CESO Annual Conference 2008, Toronto
October 7, 2008



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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?



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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

7. Program and decision impacts	7. To what extent and in what ways was the program improved? To what extent were informed, high quality decisions made?
6. Practice and program change	6. To what extent did intended use occur? Were recommendations implemented?
5. Stakeholders' knowledge and attitude changes	5. What did intended users learn? How were users' attitudes and ideas affected?
4. Reactions of primary intended users	4. What do intended users think about evaluation? What's the evaluation's credibility? believability? relevance? accuracy? potential utility?
3. Stakeholder participation	3. Who was involved? To what extent were key stakeholders and primary decision makers involved throughout?
2. Evaluation activities	2. What data were gathered? What was the focus, the design, the analysis? What happened in the evaluation?
1. Inputs	1. To what extent were resources for the evaluation sufficient and well managed? Was time sufficient?

Evaluation Action Hierarchy

Hierarchy Utilization Questions

Source: Patton, M.Q. (1997). Utilization-focused evaluation (3rd Ed.). Thousand Oaks, CA: Sage. Page 236

Draft tools for measuring evaluation influence



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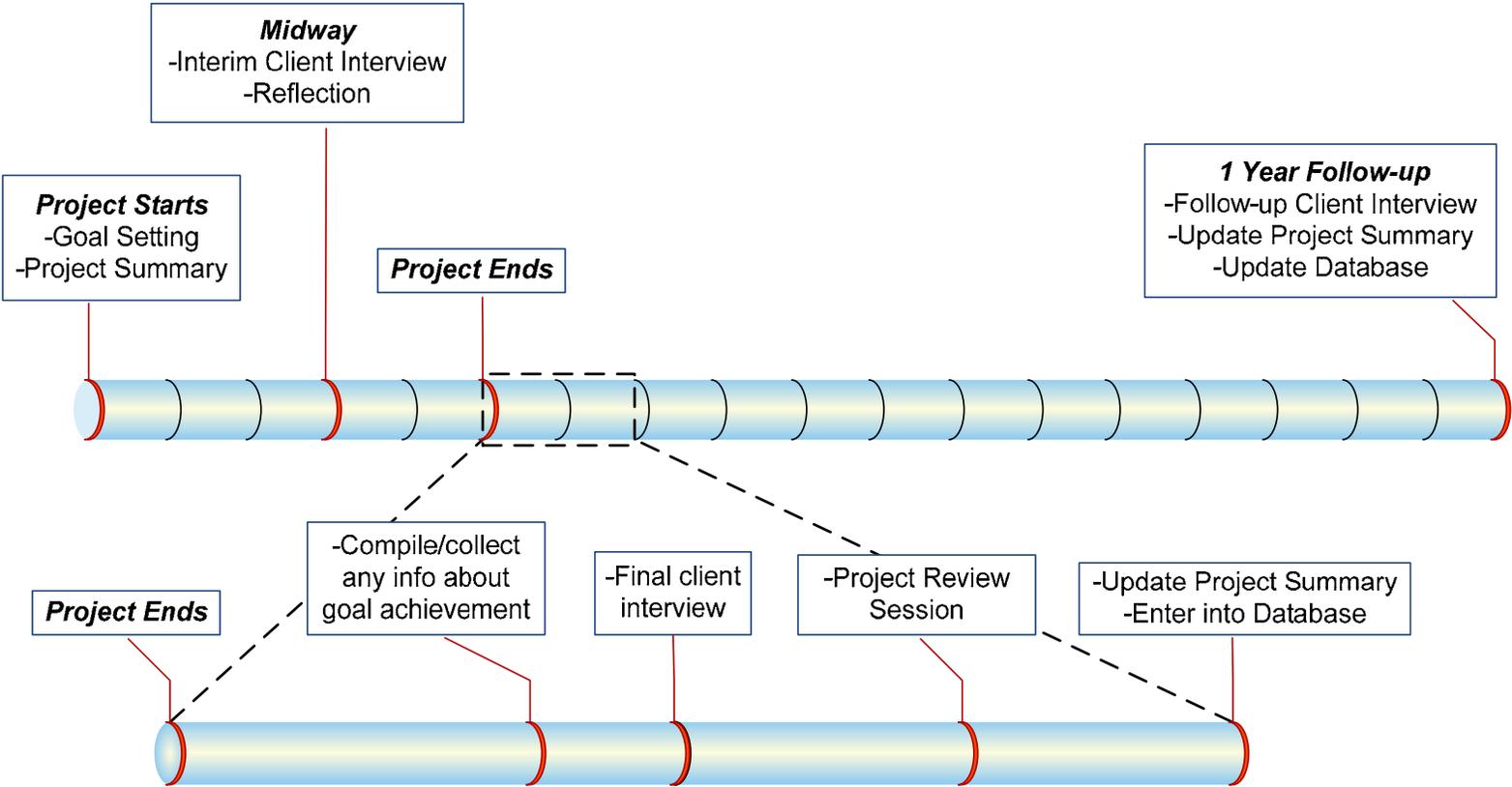
Toolkit Development

- 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



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



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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



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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)



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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



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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



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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?

