Sustaining Evaluation & Data Use: Theory & Practice

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PIE Org

Introductions

- Hello!
- PIE:
  - Chicagoland research and evaluation consultancy
  - "Help organizations identify, measure, and report outcomes"
- Primarily work with social service agencies, educational institutions, and foundations.
  - Served 50+ organizations over past 3 years

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Introductions

Now let's get to know each other better….

Evaluation Theory & Practice

"Although there is a considerable amount of evaluation theory literature, few evaluation practitioners have received formal theoretical training in evaluation. This can be explained in part by the fact that many of those conducting evaluations are not evaluators but rather people whose primary identity is with some other field (Shadish, 1998); they have little or no formal instruction in evaluation."

–(Christie, 2003, p.2)

Today's Objectives

1. Learn about a framework for sustainable evaluation practice (i.e., CQI).

2. Learn practical tips and tricks for routinizing evaluation practice and CQI

3. Apply theory and practice to our work
   - Successes
   - Failures

Development of Model for Sustainable Evaluation Practice/ CQI

Problem

- Conducting evaluations and collecting data requires considerable time, resources and expertise that many organizations do not have

  » King, 2002; Miller & Lennie, 2005; Huffman et al., 2006; Andrews et al., 2006; Chinman et al., 2008

- As a result, organizations with limited resources struggle with evaluation

  » Carmen, 2007

- CQI process is difficult to conduct with limited capacity.

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Solution

- Evaluation Capacity Building (ECB)
  - "… the intentional work to _continuously_ create and _sustain_ overall organizational processes that make quality evaluation and its uses routine"
    - Baizerman, Compton & Stockdill, 2002, p.109.

- Through ECB process, CQI more palatable for organizations.
  - ECB as foundation for CQI work

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Methodology

- Literature review of all theoretical and empirical ECB models and research
  - 12 models and frameworks
  - 57 empirical articles
    - Only 9 with follow up inquiry; none focused on sustainability
- Interviews with snowball sample of ECB practitioners and organizational leaders
    - Buy-in
    - 6 months removed from initial contract
    - Leader was with organization during intervention
- Sample
  - 16 interviews across 12 organizations
    - Non-profits, foundations, higher education

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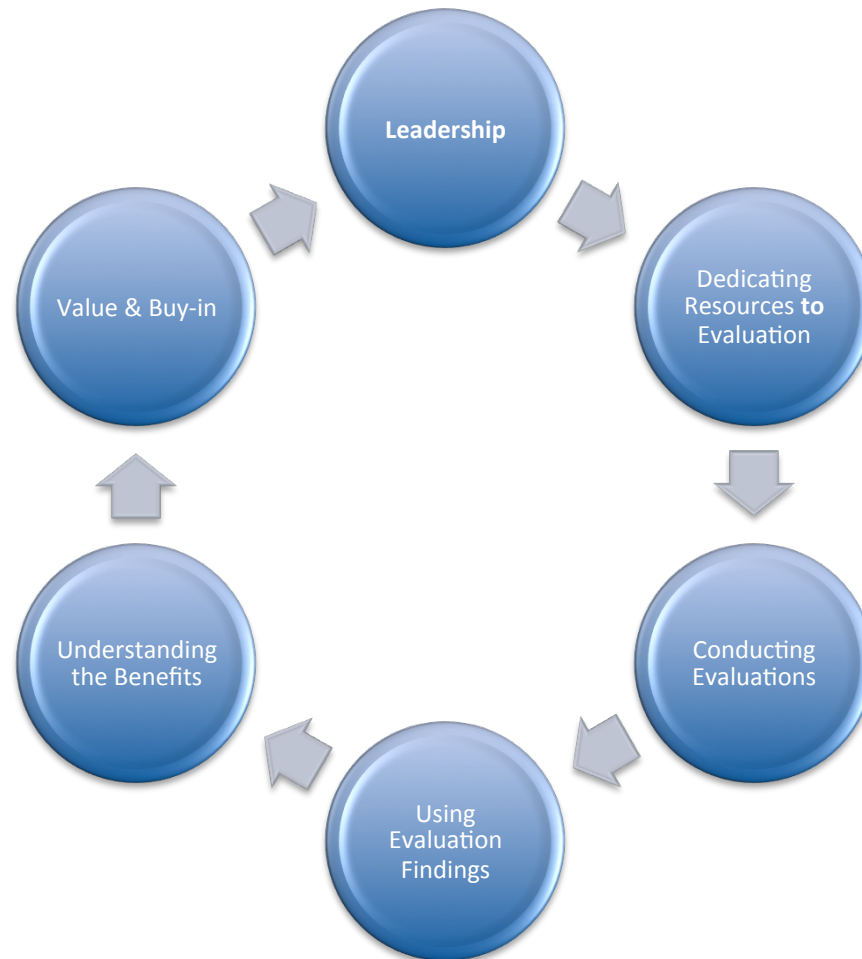
Model for Sustainable Evaluation Practice

Overview of Model for Sustained Evaluation Practice/CQI

Leadership

Boards:
Interest/ Investment, Expertise

Buy-in / Support

Evaluation Champion*

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Leadership

PIE's Tips & Tricks

- Make evaluation/ CQI visible to Board/ Board Members

- Cultivate Evaluators to be on Board

- Appeal to….
  Funding/ Efficiency/ Performance

- Good faith efforts

- Promote Leadership Visibility

- Identify and cultivate champions

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Resources

Personnel:
Job Descriptions, Interns, Hiring practices/ New positions

Technology:
I-Pads, Software Subscriptions, databases

Monetary Investment:
Consultants, trainings, **time**

Resources

PIE's Tips & Tricks

- Active Listening/ Validation

- Professional development

- Food!

- Use tech that fits needs

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Conducting Evaluations

Logic Models/ Theory of Change

Evaluation tools

Data collection protocols

Analysis & Reporting

Conducting Evaluations

PIE's Tips & Tricks

- Large group logic model meetings "Start with the end in mind"

- [Automate & Streamline](#)

- Coaching & Availability

- Flexibility: Leverage strengths / context

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Using Evaluations

Data Discussions:
Feedback for program improvement
CQI cycles

Development / Funding:
Partnership with Development team
Reporting to funders

Diffusion:
Within organization
To outside organizations

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Using Evaluations

PIE's Tips & Tricks

- Make CQI digestible/ understandable

- Strengths based language

- Tinker until it fits!

- Partner with development/ communications team from start

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Understanding the Benefits

Mission & Values of organization

Need to see human/ community/ personal benefit

Understanding the Benefits

PIE's Tips & Tricks

Reflect organizational language and values

Explicate & humanize impact

Celebrate! Point out efficiencies and improvements

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Value & Buy-In

- "We have about 25% who have been touched by assessment in such a way that they have experienced a benefit, either personal or program benefit. They do value it"

- "…we have been about to take that information and share it with the Board in meaningful ways. It helps them see why we do this and why organization community voice is vital"

Model Supports & Barriers

- Supports
  - Outside Supports
    - Beginning
  - Evaluator Rapport
    - During
  - Ongoing ECBP Contact
    - After

- Barriers
  - Stable organization context
    - Resources, Leadership, Personnel (real and potential)

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Model Supports & Barriers

PIE's Tips & Tricks

- Social credibility: Expertise & Interests
- Mirror language and values
- Cultural Competence
- Availability and making time
- Volunteer → Time & Resources
- Framing expectations

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Failures!

- Learn best from failures.
  - C & C
    - Unable to effectively engage Executive Director
    - Unable to reflect mission and values
      - Lack of cultural competence
  - NMMA
    - Turnover
    - Lost ongoing contact
    - Lack of protocols for automated reports
  - AIM
    - Never found the right tools to fit evaluation needs
    - Led to bad data, and lack of understanding among staff
    - CQI fell flat as a result and they never bought into process
      - Evaluation did not capture their program or impact appropriately.

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Model in Practice: Your Examples

- Planning time and discussion
- 10-15 minutes to review key questions
  - Group or individual
- 10-15 group share out
- Questions?

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Thank you!

- Contact me:
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