A Quick Guide to Program[1] Evaluation for Small Community-Based Organizations (CBOs)

Introduction

As someone who works in, volunteers for, or serves on the Board of a community-based organization (CBO), you are committed to "making a difference" for the people you serve and advocate for – whether they are refugees who just arrived and are overwhelmed by life in the U.S., or youth living in neighborhoods with poor schools and little opportunities, or adults with disabilities who want to be contributing members of the community.

As someone affiliated with a CBO, you also know that most CBOs are "stretched thin" – with too much work and too few resources to meet the demand for your programs and services. As a result, you may find yourself relying on the "cardiac approach" to evaluating programs and services – this is, you *know in your heart* you are doing something important so you just keep trying to do more of it.

But how do you *really know* if what you are doing is making a difference for the people you serve, and if it is, what kind of a difference are you making? To answer this question you must do some form of *evaluation*.

The purpose of this guide is to introduce you to some basic concepts of evaluation and help your CBO to establish an ongoing process for evaluation.

What is Evaluation?

Evaluation is a systematic review and assessment of the benefits, quality, and value of a program or activity, or organization as a whole. It can focus on program design, implementation, and/or results. The evaluation process should be determined *while* designing the program.

Evaluation efforts typically answer the following basic questions about a program or an organization:

- ✓ Are we doing what we do well?
- ✓ Are we doing the right things in order to meet our program objectives?
- ✓ How could we do our work better?

> **Helpful Hint…**
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> Evaluation asks…
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> - What worked?
> - What could have worked better?
> - What difference did what we do make for the people we serve?

[1] Note: We are using the term "program" loosely to refer to an organization, program or project, or an activity.

Why Should Your CBO Evaluate Its Programs?

Measuring Progress and Results:

- ✓ To be sure that your programs are achieving the desired outcomes, results, or benefits for participants.
- ✓ To be sure that your programs are responding to the current needs of your community.
- ✓ To monitor the progress of program activities – and make changes quickly if problems are identified.

Planning and Improving Programs:

- ✓ To obtain information that can be used in the planning process.
- ✓ To identify program strengths and weaknesses, which will then help you improve your programs and services.
- ✓ To be sure programs are operating efficiently.

Being Accountable to Funders and the Community You Serve:

- ✓ To be accountable to funders – most of whom now expect evaluation – and convince them of the need for continued support.
- ✓ To support fundraising by providing evidence of program effectiveness.
- ✓ To be accountable to the community you serve.
- ✓ To have information you can share with others so that they can learn from your experience – to advance the "state of the art" in your program areas.
- ✓ To enhance the credibility of your nonprofit organization in the community.

What are the Challenges to Evaluation?

Many small CBOs do not carry out evaluation in any systematic way. They might collect basic information on the number of people served or the amount of services provided, but that's all. The barriers to doing more systematic evaluation for small CBOs include:

- ✓ Limited understanding of evaluation is, how and when to do it and who should be involved.
- ✓ Lack of staff training and skills in program evaluation.
- ✓ Limited financial resources, and no specific funding for evaluation.
- ✓ Lack of funder guidance regarding expectations for evaluation.
- ✓ Difficulties in measuring program "outcomes" or results.
- ✓ The fear that a negative evaluation will eliminate possibilities for refunding. Actually, if a program is not working, evaluation enables you to find out why not, and fix it!

Who Should Be Involved in Evaluation?

Sometimes, when people think about "evaluation" and "evaluators," they think of people from outside their organization and community coming in to assess what they are doing and to tell them what they are doing right and what they are doing wrong. But evaluation does not have to be like that. Evaluation can and should be something that all of your organization's key stakeholders – staff, volunteers, program participants, partners, and Board members – are involved in. Your CBO can design and carry out evaluation activities, with support from outside evaluation consultants as needed.

Commonly Used Evaluation Terms

1. Goals. A goal is a long-term measure of desired program impact. It often takes a long time and many programs to achieve a goal. The key thing to remember about goals is that they are typically long-term, abstract results of your program (e.g., improved well-being). Every service offered and every activity performed by your organization should help lead to your program's goals.

   Sample Goal for a Youth Program:
   Youth will (1) increase their knowledge and understanding of their cultural heritage, (2) improve their performance in school, and (3) plan to attend college.

> **Keep In Mind…**
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> The Difference between Goals and Objectives
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> The difference between goals and objectives is tricky and most people use them interchangeably. Goals are *big picture* things we want to achieve and objectives are steps taken to reach our goal.

2. Objectives. Objectives are the near-term or intermediate accomplishments that help achieve or reach the program's goal. They can be measured during the project period. Objectives should be specific, measurable, and reasonable. Objectives can also be called: targets, milestones or benchmarks.

   There are two major types of objectives:

   a. Outcome Objectives. An outcome objective states the desired results of a program in measurable terms with a time deadline. Outcome objectives are the end results you want to achieve. These end results are called your ***outcomes***. (See below for further discussion of outcomes.)

      Sample Outcome Objectives: 100% of the youth who participate in the program attend at least 2 cultural enrichment activities/events by the end of the year; 50% will join an ethnic music or dance group; 75% will regularly complete their homework; 50% will demonstrate improved grades on their report cards.

   b. Process Objectives. A process objective describes the completion of key program activities or tasks essential to achieving an outcome; taken as a group, process objectives are steps along the way towards the desired results. The results of your process objectives are called your ***outputs***. (See below for further discussion of outputs.)

Sample Process Objectives: The Youth Program will (1) recruit 40 youth between the ages of 12 and 15; (2) recruit 10 volunteer to tutor and mentor the youth; (3) hold after-school activities twice per week; (4) to have one cultural enrichment activity per month.

3. Outcomes. Outcomes are program or client benefits or other results -- hopefully positive but sometimes negative -- that may occur during or after their participation in a program.

   Since change takes time, outcomes can be thought of in terms of short-term, medium-term, and long-term outcomes. You can define what is "short", "medium", and "long" based on your program's *theory of change*. That is, when you expect change to occur and what change actually looks like over time.

   Keep In Mind…

   The Difference between Outputs and Outcomes

   Outputs are products or services delivered (e.g., number of people served, number of pamphlets distributed).

   Outcomes are the change you want to achieve (e.g., increase knowledge); it usually happens as a result of your activities.

   Outcome indicators or outcome measures are specific items of information or types of data that are used to measure and track success in meeting program outcomes. For example, the following types of outcome indicators might be used by an employment and training program: placement in a permanent job, wages, hours worked per week.

4. Outputs. Outputs are direct products of program activities such as the number of women who completed computer training in an employment program, the number of hours of tutoring provided to children in an after-school program, or the number of medical examinations provided by a health care program. Outputs do not measure changes in clients, but without outputs or service units, outcomes would not occur.

5. Measures or Indicators. Measures or indicators tell you if you have reached your objectives. For example, let's say one of your outcome objectives is that "youth will do better in school." The next question is: how will know this? What is a measure or indicator of "doing better in school"? You would know that a youth is "doing better in school" if: s/he attended classes regularly, completed homework on time, had improved grades, and became involved in extra-curricular activities – these are measures or indicators.

Goals and objectives should be **measurable** – that is, they should specify the change you want to occur, the degree to which this change will occur, by when the change will occur, and how you know it occurred. (Note: For most programs it is difficult to make each goal or objective 100% measurable. Researching the topic area and careful planning will help you get close.)

What is a Logic Model and How Can You Use It in Evaluation?

A logic model is a graphic representation of a program that depicts the resources you put into your program, the program's activities, and what you expect to achieve through the program. It is a tool that can help you do a good job of planning, documenting, developing, and evaluating your work.[2] Logic models can help you:

- ✓ Develop your program. A Logic Model shows the relationships among the resources you have to operate your program, the activities you plan to do, and the changes or results you hope to achieve. It is especially helpful to show *how* your activities are supposed to cause or lead to change. Most program developers use the Logic Model to make sure the activities they do will logically and realistically lead to the changes or results they hope to achieve. The Logic Model is also a great way to clearly explain the program and its approach to key stakeholders, including other staff, other nonprofit organizations, and funders.

- ✓ Monitor and evaluate your program. Logic Models are an important tool used in monitoring and evaluation because it helps you identify what data to collect and assess whether or not your program is working as planned and achieving the intended results.

What Does a Logic Model Look Like and What Should It Include?

A typical Logic Models will have **five components** (see Figure 1):

1. Resources – the funds, staffing, technology, materials, etc. needed to carry out the program (also called *inputs*).

2. Activities – the different components of a program or specific services offered (for example, the activities for a youth program might include: outreach, tutoring, matching with mentors, and filed trips).

3. Outputs – what the program or service delivers or produces (such as the number of community members who participate or number of workshops offered).

4. Outcomes – the specific benefits or results for your clients, constituents, or participants (for example, improved grades, or skills learned).

5. Impact – the long-term benefits to your community or how your work helps communities and/or systems (for example, increased high school graduation rates).

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[2] Information modified from the W.K. Kellogg Foundation's *Logic Model Development Guide,* chapter 1.

Figure 1. A Typical Logic Model and How it Should Be Read[3]

Certain resources are needed to operate your program	**If** you have access to These resources, **then** you can use them to accomplish your planned activities	**If** you accomplish your planned activities, **then** you will hopefully deliver the amount of product and/or service that you intended	**If** you accomplish your planned activities to the extent you intended, **then** your participants will benefit in certain ways	**If** these benefits to participants are achieved, **then** certain changes in organizations, communities, or systems might be expected to occur
Resources/ Inputs ➔	**Activities** ➔	**Outputs** ➔	**Outcomes** ➔	**Impact**

Your Program **Your Intended Results**

Logic Models may also include additional components such as:

- ✓ Assumptions about the problem or issue that your program is trying to address. This may include *things* that will affect your program – e.g., the resources available, obstacles or challenges faced, and opportunities or strengths that can be built upon.
- ✓ Evaluation, what areas of the program will be evaluated.

Keep In Mind…

Logic Models do not have to be organized from left to right – have fun and be creative when designing your Logic Model. Use a tree-shaped diagram, spirals, three-dimensional drawings, or use the *Z* form.

Make your Logic Model work for you – it should facilitate your work and help stakeholders understand your program!

How Are Goals and Objectives Used in a Logic Model?

The goals and objectives should solve the problem you are trying to address. The services offered will lead to the goals and objectives. Objectives are what you plan to achieve, so if you actually achieve them then they become your outputs and outcomes.

[3] The five components and the figure have been adapted from the W.K. Kellogg Foundation's *Logic Model Development Guide,* chapter 1 available online. It has been quoted with the Foundation's permission.

What Information Do I Need to Develop a Logic Model?[4]

You need to be able to define your:

- ✓ Target population, the folks you are trying to serve or reach
- ✓ Theory of change, that describes what leads you to believe that if people are exposed to this program the desired outcomes will occur
- ✓ Inputs, the resources you'll need to do your activities
- ✓ Activities needed to produce the outputs
- ✓ Outputs, in terms of the outputs you want to achieve and at what level you want to achieve them
- ✓ Outcomes, the changes you want to see this population achieve

How Can You Create a Logic Model?

What are the steps involved?

1. Work individually or with a team to obtain written materials (e.g., program proposals) and staff input to fill out a Logic Model similar to Figure 1.
2. Draft a Logic Model.
3. Discuss with key staff and stakeholders to determine if the Logic Model is accurate, serves its purpose, and is clear and understandable or if it needs modifications.
4. Update the Logic Model based on feedback from staff and stakeholders and present it to them again until it's approved.
5. Use the logic model.
6. Revise the logic model as the program evolves and/or the internal/external environment changes.

Once you have created a logic model to describe your program or service, it will then be much easier to think about how you can evaluate the program or services. Once your logic model is developed, that means you have already through your key goals, process objectives (or expected outputs) and outcome objectives (or expected outcomes).

[4] The information in this section was adapted from a presentation from the Consumer Health Foundation, Healthy Lifestyles Collaborative, Session 1, "Designing Effective Healthy Lifestyle Programs".

What are the Most Common Types of Evaluation?

There are many types of evaluation, and a variety of terms are used to describe them. Each type of evaluation answers a different evaluation question. The most common types of evaluation for small community-based organizations are the following:

1. Process Evaluation. A process evaluation:
   - ✓ Answers the question, "What services are actually being delivered and to whom?"
   - ✓ Assesses whether program has met its "task" or "process" objectives.
   - ✓ Can address quality or participant satisfaction with the program.

3. Program Implementation Evaluation. A program implementation evaluation:
   - ✓ Examines the extent to which programs actually operate consistent with the objectives and procedures originally devised for them.
   - ✓ Compares program work plan with actual implementation.

3. Outcome Evaluation. An outcome evaluation:
   - ✓ Answers the question, "Did the program make a difference?"
   - ✓ Usually addresses immediate outcomes such as increased knowledge, awareness, or skills, or intent to change behavior.

4. Impact Evaluation. An impact evaluation is sometimes considered part of outcome evaluation. It also:
   - ✓ Answers the question, "Did the program make a difference?" but focus is longer-term -- i.e., the program's ultimate impact on clients and community.
   - ✓ Usually cannot be conducted immediately after program interventions.

5. Cost-Effectiveness Evaluation. A cost-effectiveness evaluation:
   - ✓ Compares program costs with expected benefits, or compares the cost differences of alternative program strategies.
   - ✓ Helps determine which program strategies provide the greatest benefits for the least money.

What are the Most Common Evaluation Methods or Ways to Collect Information?

Among the most common sources of information for evaluating programs and services programs are the following:

- ✓ **Program participants –** the people who are served by or participate in the programs are a key source of information. Often you cannot interview or survey everyone served by the project. So you interview a "sample" of people – ideally choose a random sample so that everyone served has an equal chance of being included in the sample – and then "generalize" the findings to the full group.

- ✓ **Program staff –** staff often have very valuable observations about how programs and services are working and their impact on participants.
- ✓ **Key informants -** individuals who are expert in some aspect of the program and can provide a valuable perspective on the program, such as public officials, other nonprofit staff, teachers, business people, or others involved with your program or its participants or target community.
- ✓ **Program documents -** such as records of services provided and outputs or levels of services, or program proposals and reports, etc.

Some of the most commonly used methods for obtaining evaluation data from these sources are:

- ✓ Application or registration forms - that provide descriptive information about the client, including his/her status before program involvement.

- ✓ Pre- and post-tests - short surveys used before and after a workshop or other educational or training activity, to assess what participants have learned.

- ✓ Other written tests - that other agencies or institutions collect, such as student report cards, or reading or math or other achievement tests used to measure what people have learned in educational courses.

- ✓ Surveys - structured questionnaires used to obtain consistent information from a large number of individuals about program effects or perceived quality of services. They can be self-administered or completed through in-person or telephone interviews. Usually they include primarily short-answer questions that can be computer-tabulated.

Keep In Mind…

What's the Difference between Qualitative and Quantitative Data?

Basically, *quantitative* information is anything you can quantify – such as the number of participants, the percent who score above a certain grade on a final exam, or the number who get jobs after completing your training program.

Qualitative information is individual narrative reports of experiences. Qualitative information is gathered with methods that are personal, direct, and open-ended, such as interviews and focus groups.

Helpful Hint…

Test Your "Instruments"!

Surveys, interview guides, focus group guides etc. are also called evaluation "instruments."

It's important to test these with a few participants, and make adjustments as necessary before using them for your evaluation.

- ✓ Focus groups - carefully planned discussions among a small group of people (typically 8-12) with certain similar characteristics, who interact in a group setting facilitated by a trained moderator using a pre-determined outline. Results often provide valuable insights, but cannot be assumed to represent the views of an entire population.

- ✓ Key person or key informant interviews - in-depth interviews used to obtain perceptions of the program and its impact from carefully selected knowledgeable individuals.

- ✓ Community forums and meetings – that are less formal but can still be a space to gather information and insights from community members.

- ✓ Observation of participants – particularly to see how they perform tasks that demonstrate new skills.

- ✓ Games, role plays, or other creative techniques - can be used to assess the effects of a training or educational activities They can be useful feedback tools even where literacy is low, and are also valuable when literacy levels are high, since they provide an active, interactive, and often entertaining means for obtaining information about what was learned and how it is likely to be applied to real-life situations, for example. Games and role plays may require participants not just to state but to apply new knowledge, which can encourage behavior change.

- ✓ Recordkeeping systems - consistent documentation of client/participant data, including the number and characteristics of participants and the services they received; and program/service-based data, which document the number and types of services provided or other activities carried out by the project.

What Are the Steps to Evaluating a Program?

To do an evaluation of your program, you'll need to:

1. Revisit logic model. Look back at your logic model. Did you state your goals and objectives in measurable terms? Do you include both process and outcome objectives?

2. Determine the scope of your evaluation. Will your evaluation measure the extent to which you

Helpful Hint…

Evaluating new Programs and Services

When you have just started a new program or services, it may be especially important to focus on process objectives. You may want to step back and evaluate if you are meeting your process objectives at the end of the first six months of a new program or service to make sure you are on track.

Because outcomes take longer to produce, you may want to wait until the end of the first year to measure outcomes.

met your process objectives, outcome objectives, or both? Will you look at short-term outcomes, intermediate, or long-term?

3. Identify the specific measures or indicators you will use to track if you are meeting your objectives. This is the information you must collect either throughout program implementation or during a specified evaluation period in order to effectively achieve the objective.

4. Agree on the sources and methods for collecting information. Decide where to find the information needed to answer the questions (e.g., program files and records, etc.). Identify the methods you will use to collect information. Some methods include ongoing project documentation, pre- and post-tests, focus groups, key person interviews, surveys, or telephone interviews. For example, you can learn about improvements in a student's grades by: asking the child, asking their parents, or reviewing their report card. Which source will give you the most accurate information? Which method (interviewing a participant/parent or reviewing a document) is easier for your organization to manage during the evaluation? You will also need to develop the data collection instruments.

5. Agree on who will be responsible for collect the information using agreed-upon methods. One or several staff persons and/or volunteers should be responsible for collecting information. Make sure you:
   - ✓ Provide training to all staff and volunteers collecting information.
   - ✓ Have someone coordinate and be responsible for "quality control" of the information collection process, reviewing initial surveys etc carefully and identifying any problems so that they can be resolved quickly.
   - ✓ Do some follow-up to ensure that interviews actually did occur and make sure there were no problems for cooperating agency staff or clients.

   If you are doing a one-time or annual evaluation, it is usually best to collect information during a concentrated time period of several weeks or a month.

> **Keep In Mind…**
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> When Staff Are Involved in Data Collection
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> To avoid bias and help assure frank responses, persons collecting the information through interviews or focus groups should not be working on the project directly.

6. Develop a work plan and timeline that describes will is responsible for which tasks and by when they must be completed.

7. Establish systems you will need for collecting data. What type of record keeping/documentation system do you currently have in place? What information are you

recording? How are you obtaining and documenting this information? Do you think there are any gaps in your current record keeping system?

8. **Tabulate, analyze, and present the information.** Once information is collected and compiled, it must be reviewed and analyzed for its content and significance. This may include computer- or hand-tabulation of quantitative data, analysis of in-depth interviews, and staff meetings to discuss and interpret findings. A written report on the evaluation should be prepared, as well as summary charts or tables if appropriate. Presenting findings in clear, easy-to-understand form helps ensure that the evaluation results are used for planning and decision making.

9. **Share and disseminate the information.** The results of the evaluation are valuable and educational not only for your organization but also to collaborating organizations, recipients of services, current and potential funders, public agencies, and local media, among other groups. Be sure to share results first with staff; they need to help assure that the evaluation leads to program improvements. Report results to funders and use positive results in future proposals, as an indication of your organization's competence and experience in operating such programs.

10. **Incorporate findings into planning for program improvements.** Your CBO should develop a regular process for incorporating the findings from evaluation into your annual planning process. What did you learn about what is working well? What did you learn about areas for improvement? What modifications or adjustments do you need to make to your programs and services?

Helpful Hint…

Summary: Typical Steps in Evaluation

1. Revisit your logic model to review program goals and objectives, including outcomes.
2. Determine the scope of your evaluation.
3. Identify the specific measures or indicators you will use to track if you are meeting your objectives – that is, the specific data needed to determine whether desired outcomes were met.
4. Agree on the sources and methods for data collection, and develop data collection instruments (survey forms or interview guides).
5. Agree on who will be responsible for collect the information using agreed-upon methods.
6. Develop a work plan and timeline that describes will is responsible for which tasks and by when they must be completed.
7. Establish systems you will need for collecting data.
8. Tabulate, analyze, and present the information.
9. Share and disseminate the information.
10. Incorporate findings into planning for program improvements.

Appendix A
Sample Outcomes and Measures
For Several Types of Programs and Technical Assistance Services

Sample Outcomes	**Sample Measures**
Increase in Youth Leadership/Empowerment	
Increased services available for youth	Documentation of new or different services, service components, or strategies to serve youth, including information on what age group and specific population; number of new service slots established for youth (stated as number of individuals served per year), for what services, and for what youth age group and population
Increased youth action	Documentation of increased youth involvement in volunteer, mentoring, advocacy, training, or other activities
Increased youth visibility	Documentation of situations in which youth have spoken at public events, led activities with other youth or adults, spoken to media representatives, been featured in the media, or otherwise represented an organization or project
Increased youth representation in decision-making positions within a nonprofit organization or planning body	Number of youth who hold leadership positions as Board members, volunteers, mentors, or part-time staff at the end versus the beginning of the program period
Increased youth knowledge and leadership skills	Number of youth who completed structured leadership training or other leadership development experiences; evidence of new or enhanced skills (based on observation, post-tests, or self-reports) among those completing training or other leadership development experiences; number of youth who have received mentoring
Strengthening of Organizational Capacity	
Strengthened governance	Documentation of improved Board functioning such as more frequent and regular meetings, consistent quorum, additional active members, establishment and use of a committee structure, completion of Board training
Increased staff capacity	Documentation of increased staff skills and functioning, such as additional staff added, completion of staff training in specified topic areas, completion of new tasks
Improved personnel management	Documentation of establishment or improvement of personnel management systems and procedures, such as job descriptions, personnel policies, employee evaluation, regular staff meetings
Improved financial management	Documentation of full implementation of new or improved computerized financial system, regular preparation of financial reports including Statement of

Sample Outcomes	**Sample Measures**
	Financial Position and Statement of Activities, adoption of internal controls, completion of an external audit, regular Board review of financial statements
Increased resource development capacity	Documentation of hiring of development staff or consultants, submission of more proposals, higher proportion of proposals funded, funding from new types of sources (e.g., corporations, individuals) or new entities
Increased/improved planning	Completion of an “environmental scan” or organizational analysis; completion of or participation in a joint community needs assessment; completion of a written strategic plan; documentation of the use of the plan to guide annual work plans and activities
Improved documentation or evaluation	Implementation of a management information system; implementation of an improved client or organizational recordkeeping system; completion of an internal evaluation; completion of an external evaluation; evidence of use of the evaluation in organizational and program planning and program refinement
Increased program capacity	Documentation of changes in program design or implementation; adoption of a new or refined prevention intervention; adoption of a new service model or strategy; monitoring and assessment data showing improved recruitment, retention, client satisfaction, and/or client outcomes based on the revised program model
Improved use of technology	Increased use of computers, development of a computer network, development or enhancement of a website, establishment of a staff e-mail system, obtaining and use of new software (e.g., for fundraising, documentation, or evaluation), purchase and use of other equipment
Improved organizational stability	Documentation of increases or stability in staff retention and Board member retention; raising of full budget, raising of needed funds earlier in the fiscal year; refunding from current funders; stable financial position (adequate cash flow, operation at a surplus, no or reduced cumulative deficit); increased staff and Board confidence of organization’s survival/sustainability
Increased funding	Increased overall budget; increased funding for a specific project or budget

Appendix B
Tips for Conducting Interviews

Conducting interviews is a very important process. The skills of the interviewer determine whether the information obtained accurately presents the views of the person interviewed. A skilled interviewer:

- Explains clearly to each person why the interview is being conducted and why her/his participation is important
- Makes an appointment to do the interview at a convenient time, and tells the person interviewed about how long the interview will take
- Explains that s/he is not on the staff of the project and is responsible for being sure the evaluation is independent and objective
- Makes the person interviewed feel comfortable in responding honestly to the questions
- Explains that all individual responses will be kept confidential, so no one except the interviewer will know what the individual said
- Understands the meaning of each question and why it is being asked
- Asks the questions in an objective way, doing nothing to encourage a particular response
- Explains clearly the use of scales and alternative responses, so the person interviewed knows the full range of possible answers *before* answering each question
- Speaks clearly and slowly when reading the questions
- Uses the same words to ask each question or clarify its meaning so everyone is really asked the same questions,
- Is always polite and friendly
- Tries very hard to keep to the agreed-upon time limit for the interview
- Has the information necessary to answer questions the person interviewed may have about the project and about the evaluation—or agrees to call back with information s/he doesn't have
- Offers to provide a summary of the evaluation if desired
- Thanks the person interviewed for his/her time
- Never discusses with other people who said what in the interviews
- Immediately after the interview, "writes up" the interview, so that notes are clear and understandable and someone else is able to aggregate and analyze the information

Writing Up the Interview: Usually, the person who tabulates and summarizes information from interviews is not the person who did the interviews. It is very important that the closed-ended responses are clearly checked off and that open-ended responses and descriptions are neatly written and clear. This means that when you interview someone, you should:

- Write detailed notes to record each response during the interview.
- Focus not on trying to write down complete sentences but on recording key words (using the exact words of the person being interviewed where possible).
- If the person speaks too fast, ask her/him to slow down, explaining that you want to be sure to record responses fully and accurately.

Appendix C

Steps for Integrating Evaluation into Your Everyday Work[5]

1. **Be sure you believe in and understand the value of evaluation as an ongoing part of your work.** Know the benefits and be able to explain them to others.

2. **Agree on a context for evaluation – a way of viewing evaluation and its role in your organization.** Work with staff and volunteers and with your board to gain a shared philosophy about evaluation. Evaluation can be viewed:
   - **As ongoing**, built-in and integrated into the everyday activities of the organization.
   - **As learning**, helping you identify needed improvements in projects or activities rather than only making a summative judgment (at the end of the project or the end of the year) of what you did or did not accomplish.
   - **As internal,** driven not only by external demands for accountability but also your own need to hold yourself accountable.
   - **As participatory**, encouraging an inclusive process that involves organizational stakeholders (among them your staff, board and other volunteers, and clients or constituency) in designing and implementing the evaluation.
   - **As empowering,** equipping staff with the knowledge to understand and measure the impact of their work.
   - **As promoting overall organizational effectiveness**, allowing for the assessment of the entire organization versus only a particular project or program.

3. **Learn evaluation basics and terminology – types of evaluation, basic types of information to collect, how to use the Logic Model – so you can teach others in your organization.** You don't have to be an evaluation expert to understand them – just use your program experience and become familiar with the Logic Model, and with participatory evaluation approaches.

4. **Identify the ways you are already using documentation and evaluation.** Most organizations are doing more evaluation than they realize. For example, you probably document your work (populations worked with, activities, level of activity or "outputs," whether projects are meeting timelines). If you do education or training, you probably ask participants to evaluate the sessions. You periodically sit down and ask how a particular project is doing, or how it should be redesigned or improved for next year. When you write proposals, you probably summarize accomplishments or outcomes. You may have had an external evaluation carried out on one project or your overall work.

[5] Mosaica and Shatil co-authored Appendix C in 2007. It has been revised for use with small community-based organizations.

5. **Think about how else you would like to use evaluation, and why you want to integrate it into your everyday work.** Is your main focus ensuring program quality, raising more funds, motivating staff, improving impact, or a combination of these and other benefits? Do you perhaps want to become a learning organization – an organization that makes a long-term commitment to obtaining and using new knowledge and insights to review and improve its work, including program operations and management? It helps to introduce evaluation in the context of its benefits and your broader intentions.

6. **Engage other staff in exploring how to better use and integrate evaluation**. Present information on evaluation and its benefits and engage them in reviewing the model and considering what your organization should do.

7. **Agree on a plan for implementing your evaluation.** If your staff is small, consider ways to make evaluation manageable for program staff.

8. **Get board buy-in.** You may want the board to approve the plan, or you may simply want them to agree on the value of integrating evaluation. Promise updates at least twice a year.

9. **Inform key donors and seek funding to help support your evaluation work.** Funders are increasingly concerned about evaluation and accountability, and some will provide special grants, supplements to program grants, or ongoing funding for evaluation.

10. **Implement, review, refine, and share results.** Revise your plan as needed. If your timetable was too ambitious, scale it back. Share results and use them to highlight and celebrate successes.