

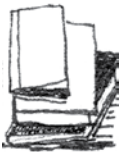


### Step 7: Evaluate progress and results<sup>2</sup>

What do you think about when you hear the word evaluation?

- What's that?
- Ugh!
- No time!
- When do you do it?
- We do that already.

- \_\_\_\_\_
- \_\_\_\_\_



#### Evaluation plan

The evaluation plan shows how you plan to collect and analyze information while the project is operating. The information helps you know what to change during the project to help you reach your project goal. You also use the information to answer evaluation questions at the end of the project. The Starting Your Project section has an in-depth evaluation section that includes a step-by-step evaluation plan.

People evaluate projects and programs to:

- Develop and improve what they are doing.
- Know when to make changes.
- Figure out what success looks like and share this information with others.
- Celebrate success and learning from valuable mistakes.
- Show results to supporters and increase the chances of getting more support in the future.

<sup>2</sup> *What is Project Evaluation*, Government of Ontario,  
[http://www.reddi.gov.on.ca/track\\_what.htm](http://www.reddi.gov.on.ca/track_what.htm)



### **Why is project evaluation important?**

Evaluating project results helps to provide answers to key questions like:

- What progress has been made?
- Were the desired outcomes achieved? Why?
- Are there ways that project activities can be refined to achieve better outcomes?
- Do the project results justify the project inputs?

### **Why do we sometimes avoid evaluation?**

It is still fairly common for people to carry out projects and activities without doing the kind of evaluation they need to do. Here are some of the reasons that people give for not doing evaluation:

- Limited time.
- Not enough money.
- Not sure how to do it.
- Don't see it as being important.

People who do not evaluate are missing out on the opportunity to learn from their experience. Mistakes are expensive, so why waste them!



### Some simple ways to do evaluation

There are all kinds of ways to evaluate a project. A small, effective evaluation is always better than no evaluation at all. Right from the beginning, encourage everyone to think about the project and make change when needed.

Here are a few simple examples:

- Ask workshop participants for their feedback about a workshop. Make the feedback session part of the workshop agenda. Relate the feedback to the purpose of the workshop.
- Find out how things are going in a project by talking regularly to people who are taking part in the project. Always be open to hearing what they have to say. Keep notes or ask if you can use a tape recorder.
- Hold a check-in meeting and make sure that people feel comfortable enough to speak up. Put the main points on flip chart paper so the group can see their words and so you have a record for later.
- Talk to other people in the community who may not be part of your project but who may be in a position to see changes that are happening as a result of your project.
- Collect stories about what it was like to take part in the project or about something good that happened as a result of the project. Record them in writing or use a video or audio tape.
- Ask permission to keep a confidential record (no names attached) of people's stories and comments. Ask if you can share some of these stories and comments with funders or others who support the project.



### What are the challenges in monitoring and evaluating?

- Getting the commitment to do it.
- Establishing an evaluation framework at the beginning of the project.
- Identifying realistic quantitative and qualitative indicators.
- Finding the time to do it and sticking to it.
- Getting feedback from your stakeholders.
- Reporting back to your stakeholders.



### Activity

In your planning stage you identified the outcomes for your project. These will help you measure the success of your project. Read the information below and review the sample evaluation plan and then use the blank form to fill out an evaluation plan for your project.

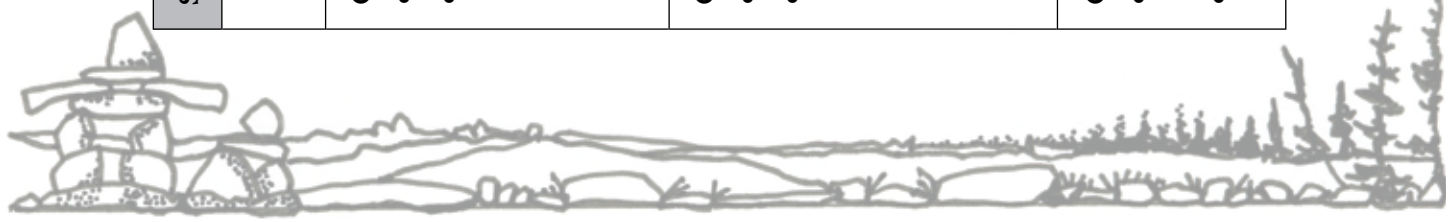
Answer the questions below to help develop an evaluation plan:

- What results do you expect from each project objective? These come directly from the work plan.
- What indicators will you use to measure the results? “Indicator” is a general term for the information you gather to measure the project results.
- How will you gather the information? For example, from interviews, project records or other ways.
- When will you gather the information?
- Who will provide information? Who will collect it? Who will write the evaluation reports?
- How will you share the results of the evaluation? This is sometimes called dissemination.

People need time and certain skills to do a good evaluation. Consider including money in the budget to carry out the evaluation and write the reports and/or for training about evaluation.

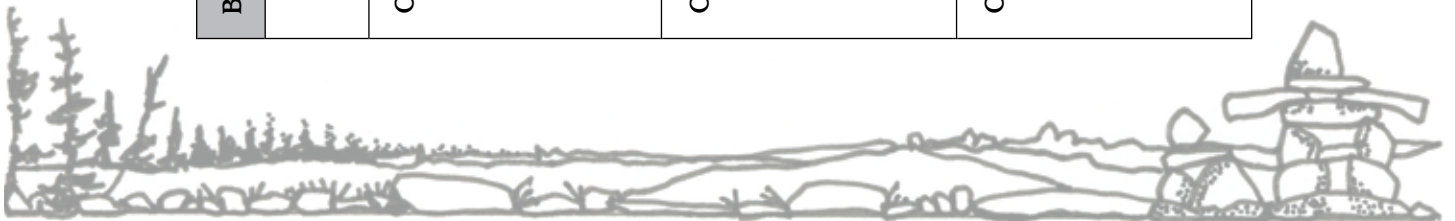


Sample Evaluation Plan		Project Name: Family Literacy Project	
	Results (from work plan)	Indicators and data to measure results	Sources of data
<b>Objective 1</b> <ul style="list-style-type: none"> <li>• Workshop</li> <li>• PSAs</li> </ul>	Families understand that reading and doing literacy-related activities is important.	<ul style="list-style-type: none"> <li>• Number of times the PSA plays on the radio</li> <li>• Number of parents who attend the information session</li> <li>• Workshop evaluations</li> <li>• Workshop materials that parents receive</li> </ul>	<ul style="list-style-type: none"> <li>• Workshop attendance and evaluations</li> <li>• Feedback from parents</li> <li>• Feedback from teachers, partners, etc.</li> <li>• Project records and financial reports</li> </ul>
<b>Objective 2</b> <ul style="list-style-type: none"> <li>• Workshop</li> <li>• Leaflet</li> </ul>	Parents have new tools and ideas to help them with their children's literacy development.	<ul style="list-style-type: none"> <li>• Number of families that attend the family literacy workshops</li> <li>• Workshop evaluations</li> <li>• Family literacy leaflet produced</li> <li>• Number of leaflets mailed</li> <li>• Workshop material that families receive</li> </ul>	
<b>Objective 3</b> <ul style="list-style-type: none"> <li>• Home-based family literacy</li> <li>• Resources</li> </ul>	Parents have new ideas to help them support their children's literacy development in the home.	<ul style="list-style-type: none"> <li>• Number of families who participate in program</li> <li>• Number of resources produced and distributed</li> <li>• Parent evaluations</li> </ul>	





Blank Evaluation Plan		Project Name: Family Literacy Project	
	Results (from work plan)	Indicators and data to measure results	Sources of data
Objective 1			
Objective 2			
Objective 3			





# Evaluation<sup>7</sup>

We have already touched on evaluation in the Project Planning section in this manual. This section will provide a more in-depth overview of evaluation.

Evaluation is an important tool that your organization can use to show that it is accountable, to improve programs and to better access funding in the future. Project evaluation helps you understand the progress, success and effectiveness of a project.

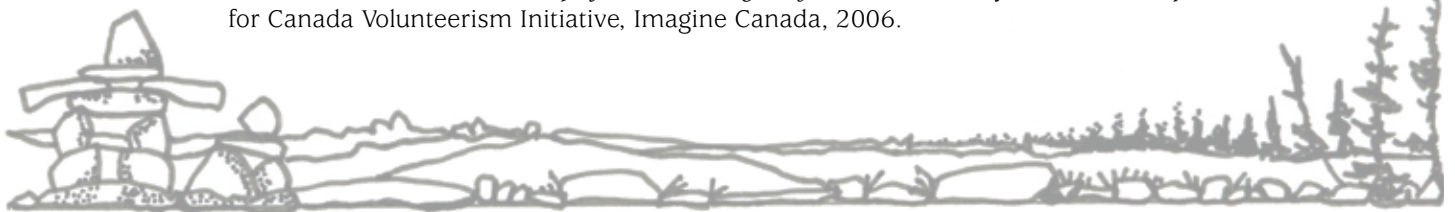
You can use the results of a project evaluation to:

- Identify ways to improve your project activities.
- Make changes to your project plan.
- Prepare project reports.
- Plan for long-term projects.
- Demonstrate your organization's ability to develop and deliver projects.
- Learn more about the strengths and weaknesses of the project.

This section will cover:

1. Developing an evaluation plan
2. Evaluation tools
3. Sharing your results

<sup>7</sup> This section has been adapted from *Project Evaluation Guide for Non-profit Organizations: Fundamental Methods and Steps for Conducting Project Evaluation*, by Fataheh Zarinpoush for Canada Volunteerism Initiative, Imagine Canada, 2006.





## 1. Develop an evaluation plan

Follow the template below to create your evaluation plan.

### Step 1: State project goal

Your project goal is a broad statement about the purpose of your project. A project goal is supported by up to three objectives. This information should be in the proposal you wrote for the project.

### Step 2: State project objectives

Objectives describe the ways in which you will carry out your project goal. You will be able to use these objectives throughout your project to see how well you are doing in reaching your project's goal. This information should be in the proposal you wrote for the project.

### Step 3: Identify evaluation stakeholders

Stakeholders are the individuals or organizations that have an interest in your project. Prepare a list of stakeholders. Identify potential evaluation participants. Ask them to be part of the evaluation team. Identify potential users of the products and activities of the project.

### Step 4: State project outcomes

The outcomes of a project are the changes that happen. Outcomes are changes or effects that participants or other stakeholders of your project experience as a result of their involvement. Outcomes of your project may appear gradually, therefore, it is often helpful to divide them into two stages – immediate and intermediate outcomes. For example: the intermediate outcome or result of a family literacy project might be more parents reading to their children; the immediate outcome might be more parents are aware of the importance of reading to their children.



### Step 5: Identify evaluation indicators

Indicators are measurable factors or evidence that show the extent of the project's progress, success or achievements. Indicators can be quantitative, such as the number of participants, number of hits on your web site and rate or rank of opinions. They can also be qualitative, such as positive or negative feedback, problems or comments. You can also use project outputs or deliverables as indicators. For example, if one of your objectives is to provide other agencies with a family literacy tool kit, a complete version of this kit is an output or deliverable that indicates your project's progress.

How do you identify evaluation indicators?

1. Review the project objectives and think of the information and evidence that you need to demonstrate the achievement of each one.
2. Review the evaluation questions and think of the information you need to answer each question.
3. Review the project activities and look for any measurable factor indicating each activity's progress.
4. Review the projected project outcomes and think of the information and evidence that ensure those outcomes occur.
5. Review the project output or deliverables and determine how they can represent the project's progress and achievement.



Here are some examples of indicators:

### *Quantitative indicators*

- Response rate to an advertisement or announcement
- Number of hits on your web site
- Number of inquiries
- Participants' level of satisfaction (for example, 1 to 4 scale)
- Number of resources used

### *Qualitative indicators*

- Types of inquiries
- Feedback on workshops or training
- Reported or observable changes in attitudes, behaviours, skills, knowledge, habits, etc.
- Types of problems or complaints
- Participants' perceptions of the project or services

### *Products as indicators*

- Number of workshops held
- Number of people trained
- Resources developed
- Number of resources distributed
- Web site developed
- Training kit or workshop tool



### **Step 6: Select evaluation types**

Selecting an evaluation type provides direction for your evaluation. The two most common types of evaluation are formative and summative. You can do both a formative evaluation and a summative evaluation of a project.

Formative evaluation is an ongoing evaluation that starts early in the project. It is used to monitor activities to make sure a project is running smoothly. Formative evaluations help you monitor your project and make changes during your project. Internal staff can do formative evaluations. An example of a formative evaluation might be asking participants of a workshop to fill in an evaluation half way through the training. The feedback you receive will help you meet the needs of the participants during the rest of the training.

Summative evaluation is an overall assessment of the project's effectiveness and achievements. It shows whether the project did what it was supposed to do. It also provides information for future planning. Someone outside the organization should do this type of evaluation. A summative evaluation might be done through a phone survey or focus groups.



### Step 7: Choosing evaluation questions

Evaluation questions are the key questions that you need to answer to help you understand the impact, effectiveness and achievements your project has had. You will have different questions for formative and summative evaluations.

Some examples of formative evaluation questions are:

- Are the activities happening as planned?
- Is the project reaching the target audience?
- Is the project reaching the intended number of participants?
- How satisfied are the participants of the project?
- How should we modify the activities to meet the needs of participants?
- What lessons have we learned so far?
- Do activities meet the needs of participants?

Some examples of summative evaluation questions are:

- Did the participants experience any changes in their skills, knowledge, attitudes or behaviours?
- What changes did we expect? What changes actually happened?
- What are the effects of the project on our organization (pride, networking, partners)?
- What could be the long-term impact of this project?
- What could we have done differently to be more effective?
- What lessons have we learned for the future?
- What would we like to continue?



### Step 8: Choosing evaluation tools

Evaluation tools help you gather the information you need to answer your evaluation questions. You can use both formal or informal ways of gathering information. Formal evaluation tools include focus groups, interviews and survey questionnaires. Informal evaluation tools include observation, informal conversations and site visits. Use this chart to help you decide on what tools to use.

Evaluation Tool	Description	Formal	Informal
Survey	Either a written document or interview with a select group of people.	✓	
Interview	A set of questions about the project that are asked of a target group.	✓	
Focus Group	Group discussions about the project.	✓	
Evaluation form	A set of questions for a target group at the end of an activity. For example you would give out an evaluation form at the end of a workshop.	✓	
Observation	Notes taken during the project.		✓
Conversation	Talking to participants about the project.		✓
Anecdotal information (stories)	Stories about the project described by staff or participants.		✓



**Step 9: Create an evaluation map**

Take all the information that you have developed for your evaluation and put it all together in an evaluation map. This map will show you and your funder, at a glance, how you plan to show success of your project. It will outline all your activities and provide details on your evaluation plan.

Develop a chart that shows how you will evaluate each objective. The chart should include: objectives, activities, indicators, evaluation questions, evaluation tools and sources of data. The evaluation template on the evaluation planning worksheet gives an example of an evaluation map.



**Evaluation plan worksheet**

Follow the template below to create your evaluation plan.

**Step 1: State project goal**

What is your goal?

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**Step 2: State project objectives**

What are your objectives?

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_



### Step 3: Identify evaluation stakeholders

Who are your stakeholders?

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Which stakeholder should participate in this evaluation?

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Which stakeholders will need information from this evaluation and will see the results?

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### Step 4: State project outcomes

What outcomes do you expect to achieve during or right after completing your project?

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What outcomes do you expect to achieve within three to six months after the completion of your project that you can attribute to the activities of your project?

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**Step 5: Identify evaluation indicators**

What are your indicators?

Quantitative

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Qualitative

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Outputs or Deliverables

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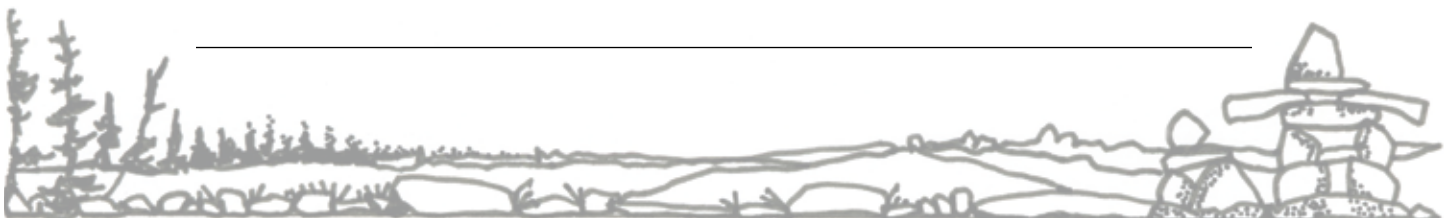
**Step 6: Select evaluation types**

What evaluation type will you use?

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## Step 7: Choose evaluation questions

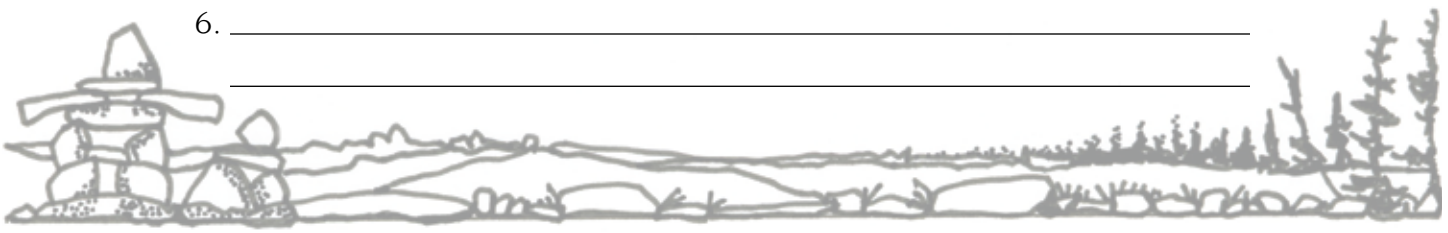
What evaluation questions will you use?

1. \_\_\_\_\_  
\_\_\_\_\_
2. \_\_\_\_\_  
\_\_\_\_\_
3. \_\_\_\_\_  
\_\_\_\_\_
4. \_\_\_\_\_  
\_\_\_\_\_
5. \_\_\_\_\_  
\_\_\_\_\_
6. \_\_\_\_\_  
\_\_\_\_\_

## Step 8: Choose evaluation tools

What evaluation tools will you use for each question?

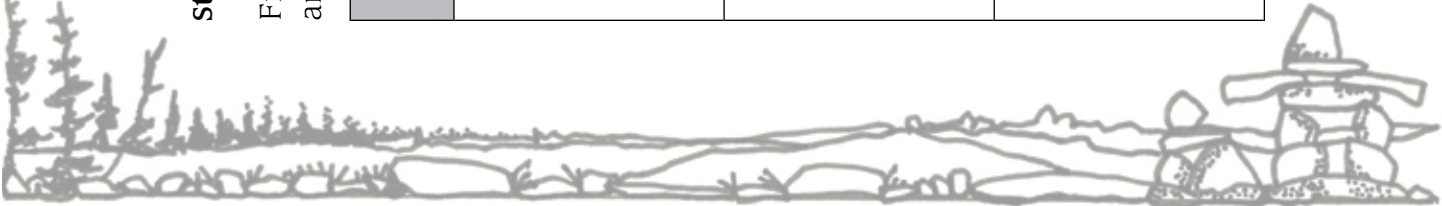
1. \_\_\_\_\_  
\_\_\_\_\_
2. \_\_\_\_\_  
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3. \_\_\_\_\_  
\_\_\_\_\_
4. \_\_\_\_\_  
\_\_\_\_\_
5. \_\_\_\_\_  
\_\_\_\_\_
6. \_\_\_\_\_  
\_\_\_\_\_



**Step 9: Create an evaluation map**

Fill in the chart below with all the information from your evaluation plan. This chart will help you organize and keep track of your information.

Objective	Project activities	Indicators/ deliverables	Evaluation questions	Evaluation tools	Sources of data
Objective 1					
Objective 2					
Objective 3					





## 2. Evaluation tools

This section covers:

1. Focus groups
2. Designing questionnaires
3. Surveys
4. Interviews

### Focus groups

What is a focus group?

A focus group is a guided discussion used to explore people's thoughts, feelings and opinions on a specific topic. Usually, focus groups involve six to 12 people who are asked to respond to a series of questions. A focus group usually lasts about two hours. Often groups do several focus groups to get better information about their project. Focus groups help provide information that may otherwise be difficult to get.

When should you use a focus group?

You should use focus groups to evaluate large projects that have run for several years. It is not necessary to use a focus group for small projects.

### Designing questionnaires

What is a questionnaire?

A questionnaire is a tool for gathering information from individuals and organizations. You can use it to measure opinions, attitudes, behaviours and perceptions. You can also use it to collect demographic information, such as gender, age, etc.



## Types of questions

*Open-ended questions* ask people to answer in their own words. For example: Why did you attend the family literacy program? The information gathered from open-ended questions is considered qualitative information.

*Closed questions* ask people to select an answer from a list. For example: Which of the following is the main reason you attended the family literacy program? The information gathered provides quantitative data.

Tips for designing a questionnaire:

- Questions should be easy to read and understand.
- Questions should explore one piece of information and be related to the project.
- Questionnaires should be organized so that the questions are arranged in a logical order and the first few questions are easy to answer.
- Use both closed and open-ended questions.
- Test your questionnaire on a few people:
  - Make sure it is only 15 minutes long.
  - Make sure that all the questions are easy to understand and answer.

## Surveys

Surveys help to study individual opinions, attitudes, behaviours and beliefs by using a set of questions for a small group of people. Surveys use a sample of the target population. Sampling means that you only select some people from the target audience. You would use this kind of evaluation tool if you had a large target audience. For example: You might survey your community to find out if the advertising you used for your program was effective.



### Interviews

An interview is a conversation for gathering information. You can do interviews face-to-face or over the telephone. The Internet is also emerging as a tool for interviewing. You use interviews to collect in-depth information on people's opinions, thoughts, experiences and feelings.

How do you do an interview?

- Define your objectives. Identify what you want to achieve and the information you need to gather.
- Choose appropriate people.
- Decide on how many people you will interview.
- Decide on how you will conduct the interview (telephone, face-to-face, Internet).
- Decide on how you will ask people to participate.
- Decided on how you will record the interviews.
- Make a list of questions.
- Decide on who will conduct the interviews.





### 3. Sharing your results

You should communicate the results of your project to both external and internal stakeholders. Most projects require that you write a report about your project. The next section provides a guide for report writing. You can also share your results through presentations, the media and the Internet.

You can use the results of a project evaluation to:

- Identify ways to improve or change your project activities.
- Facilitate changes in the project plan.
- Prepare project reports.
- Inform internal and external stakeholders about the project.
- Plan for the long-term.
- Learn more about the target population of the project.
- Present the worth and value of the project to your stakeholders and the public.
- Plan for other projects.
- Compare projects.
- Be accountable to your funder and other stakeholders.
- Celebrate your success.





## Report Writing

You will need to write reports for your funders. Often funders want an interim report and a final report. You usually write an interim report at the mid-point of the project and the final report when you have completed the project. A report provides a record of your project and its results.

Your report should describe, for the funder, the activities and impact of your project. When you write your report, refer back to the proposal. Make sure you inform the funder of all of your activities, deliverables and outputs in the report. When you report on your project, you want the funder to have a good picture of what happened, how it happened and why it was important.





## Guidelines for writing your report

Your report should include the following:

### 1. Project summary

Provide a brief summary of your project. Use the information from your proposal.

### 2. Goal and objectives

Describe your goal and objectives. Use the information from your proposal.

### 3. Activities and results to date for each objective

Describe the activities for each objective and the deliverables for each activity. Refer to your work plan and evaluation plan from your proposal. Set this section up as a chart.

Objectives	Activities	Deliverables (what did your project produce)
Objective 1		
Objective 2		





### **4. Impact/outcomes (final report)**

Discuss the results of the project. What changed as a result of this project? Are more parents reading to their children? Are people more aware of literacy issues in their community? Was the project worthwhile? Why or why not? What would you do differently if you did this project again?

### **5. Lessons learned (final report)**

What would you recommend for your next project? What changes would you make? What would you do the same?

### **6. Dissemination plan (final report)**

How will you disseminate the results of your project? Many funding agencies are interested in seeing how their financial support of your project has helped others and how the information is being used. This may include newsletters, workshops, radio broadcasts, presentations, printed handouts, slide shows, training programs, etc.

