# Non-Accessible Content by Unit

## Unit 1

### Section 4

**Scenario**

How much of a role does data, evidence, and evaluation play in your day-to-day decision-making?

Answer Choices:

1. A lot. It informs most of the decisions I make. (Response: Congratulations! Evidence-informed tools such as evaluation are critical for effective management, creating a culture of learning, and innovating for change.)
2. Some. But I don't always have it when I need it. (Response: Using evidence-informed tools like evaluation can make it easier to manage effectively, create a culture of learning, and innovate for change.
3. Not enough. I wish I could use it more. (Response: Although many factors influence decision-making, evaluation can help you manage more effectively, create a culture of learning, and innovate for change.)

### Section 5

**Table**

| Type | Question Answered |
|---|---|
| Evaluation | Did the program achieve its intended goals? |
| Research | Why or by what mechanism did the program achieve its goals? |
| Performance Measurement | To what extent did the program achieve its goals? |
| Performance Audit | How can we change or adapt the program to better achieve its goals? |
| Quality Improvement | Was the program implemented effectively? |

## Section 6

Knowledge Check

Check your understanding of these evidence-generating processes by matching the primary purpose to the name of the process.

| Type | Purpose |
|---|---|
| Evaluation | Assessment of the implementation or impact of an initiative for decision-making |
| Research | Develop or contribute to generalizable knowledge |
| Performance Measurement | Process of collecting data to compare implementation against expected results. |
| Quality Improvement | Management process to improve internal processes, practices, costs, productivity |

## Section 8

Flashcard Activity - Fostering Evaluative Thinking

What might you do to foster more evaluative thinking in your organization? Click each square to learn more.

Foster – Foster staff curiosity and questioning.
Educate - Educate staff about the value of evaluation and provide training in basic concepts.
Include - Include staff in developing relevant and feasible evaluation plans.
Resource - Resource evaluation activities appropriately.
Embrace - Embrace learning and change in response to evaluation findings.
Incorporate - Incorporate evaluation findings into the strategic planning and program planning processes.

## Unit 2

## Section 13

Flashcard Activity - Your Practice

Think about your workplace. Click on the statement below that best describes the focus of the evaluations that come across your desk.

How well a program is being implemented. – This is a process evaluation.
What impact a program makes. – This is an outcome evaluation.
A combination of the two. - Many evaluations are a combination of
both process and outcome evaluation.
I see little evaluation in my organization. - Both process and outcome evaluation can inform your
decision-making.


## Section 16

### Basic Steps in Evaluation

Whether you are conducting a process or outcome evaluation, most evaluations typically follow these
basic steps:

1. Focus the evaluation
2. Plan the evaluation
3. Collect and analyze data
4. Report findings
5. Make decisions

Implicit in these five steps is the engagement of the people and communities served throughout.
Click the arrow to the right for more details.

*You can download a PDF version of the Steps in Evaluation at the end of Unit 2: Summary lesson.*

1.  Focus the Evaluation

*Tasks include:*
Identify and work with intended users
Clarify purpose of evaluation and context
Develop Logic Model/Theory of Change
Determine evaluation questions

*Deliverables:*
Logic Model/Theory of Change
Evaluation Questions


2.  Plan the Evaluation

*Tasks include:*
Determine Output and Outcomes measures

Identify data sources and collection methods
Assign timing, responsibility, and budget

*Deliverables:*
Evaluation Framework

3. Collect and Analyze Data

*Tasks include:*
Develop and pre-test data collection tools
Collect data
Analyze data
Review findings and formulate recommendations

*Deliverables:*
Data and Findings

4. Report Findings

*Tasks include:*
Identify target audience(s)
Determine key messages
Determine appropriate forms of communication and data visualisations.
Present/disseminate findings

*Deliverables:*
Final Report

5. Make Decisions

*Tasks include:*
Review findings and recommendations
Ask questions
Develop action plan
Act on recommendations

*Deliverables:*
More Effective Programming


## Section 18

Table

| Logic Model | Theory of Change |
| --- | --- |
| "What" | "Why" |
| Descriptive | Explanatory |
| Linear | Less linear |

## Section 23

**Flashcard Activity – Sample Evaluation Questions**

Sample Evaluation Question #1 –    How satisfied are participants with the [program]?

Sample Evaluation Question #2 –    How well is the [program] reaching the target audience?

Sample Evaluation Question #3 -    What has worked well with the [program] delivery? Where could things improve?

Sample Evaluation Question #4 -    How well has the [program] achieved it's intended outcomes?

Sample Evaluation Question #5 -    Do different groups experience our programs or services differently?

Sample Evaluation Question #6 -    To what degree should the program be scaled up, and what would be required?

Sample Evaluation Question #7 -    Do the benefits of this intervention outweigh the costs?

## Section 26

**Matching Quiz #1**

Click and drag the type of evaluation (on the left) to its correct definition (on the right).

Process - how well a program is being implemented
Economic – cost-benefit analysis or cost-effectiveness analysis
Monitoring – continuous process of collecting selected data
Outcome – what impact a program makes

**Matching Quiz #1**

Click and drag the evaluation steps on the left to the correct order on the right.

Focus the evaluation – 1
Plan the evaluation – 2
Collect and analyze data – 3
Report findings – 4
Make decisions - 5

## Unit 3

### Section 28

#### Scenario

As a leader, how do you ensure that the evaluation findings you receive reflect the principles of equity, diversity, and inclusion (EDI or DEI)?

Answer Choices:

1.  I trust the evaluator to do what's right. (Response: Many evaluators are skilled at doing an equitable evaluation, but leaders also play a critical role in ensuring an evaluation addresses the systemic drivers of inequity and does not perpetuate harm.)
2.  I have standard questions that I ask. (Response: That's great! Leaders play a critical role in ensuring an evaluation addresses the systemic drivers of inequity and does not perpetuate harm.)
3.  I'm not sure what equity has to do with evaluation. (Response: If equitable approaches are not used, evaluation can be a tool that perpetuates systemic inequities. Leaders play a role in ensuring evaluation addresses these inequities and does not perpetuate harm.)

### Section 29

#### Flashcard Activity – Benefits of Equitable Evaluation

Consider these benefits of incorporating the perspectives and greater inclusion of racialized and other communities in all aspects of an evaluation:

Benefit #1 – Stronger evaluation design
Benefit #2 – More authentic, accurate, and detailed data
Benefit #3 – Better interpretation of the findings
Benefit #4 – Enhanced utility of the results
Benefit #5 – Improved overall quality of the evaluation
Benefit #6 – Enhanced community capacity

### Section 30

#### Table

Compare these key differences between a traditional and equitable evaluation approach.

| Area | Traditional Evaluation | Equitable Evaluation |
|---|---|---|
| Purpose & Audience | Funders of the evaluation determine the evaluation's purpose, and are the only audience for the results. | Members of the equity-seeking community and funders co-determine the evaluation's purpose. The audience is both the funder and a diverse cross-section of community, i.e., those traditionally under-represented voices or most marginalized. |
| Evaluator | The evaluator is a formally-trained "objective" expert who leads the evaluation. They often do not represent the language, culture, racial or ethnic composition, or lived experience of the community. | Community members and/or people served and impacted, plus the evaluator, each bring their valuable expertise to the evaluation team. The evaluator acts as a facilitator, translator, and convener. |
| Evaluation Design | The evaluator develops the design and presents to the funder for approval. | The evaluator engages people served and impacted in an inclusive planning process. Community members have an equal voice in what is evaluated and how. |
| Data Collection | The evaluator conducts all the data collection. Quantitative data and experimental research provide the most credible evidence. | A representative group of trained participants helps the evaluator to collect the data. |
| Data Analysis | The results are analyzed and interpreted by the evaluator. | The results are analyzed and interpreted together by people served and impacted and the evaluator. The analyses focus on the role of culture, context, systems, structures, institutions, and underlying drivers of inequity. |
| Reporting | Typically a written report is prepared by the evaluator and presented to the funder. | Results are presented in non-traditional formats |

| | | appropriate for diverse audiences and communities. |
|---|---|---|
| Use | Results are used by funders to monitor and judge the quality of the program and its impact. | Results are used to build the capacity of the community and community organizations. |

Matching Activity

Sort these descriptions based on the evaluation approach.

Community members help the evaluator to collect data – Equitable
Results are analyzed and interpreted by the people served and impacted, and the evaluator – Equitable
Evaluator develops the design and presents to the funder for approval – Traditional
Results are analyzed and interpreted by the evaluator – Traditional
Evaluator is a formally-trained expert who leads the evaluation – Traditional
People impacted by the program have an equal voice in what is evaluated and how – Equitable
The evaluator engages community members in an inclusive planning process – Equitable
The analyses focus on the role of drivers of inequity – Equitable
Results are used by funders to judge the quality of the program – Traditional
Evaluator conducts all the data collection – Traditional

## Section 32

Indigenous Evaluation

Indigenous and decolonized approaches to evaluation arose out of a lack of trust with traditional Western-style research and evaluation. This approach is similar to an equitable approach but is also characterized by the following:

- Indigenous rights & title holders are not participants in the evaluation but rather the drivers and producers of their own research.
- A transparent evaluation purpose, questions, and design, that also clearly benefits the community.
- The community's perspective on important issues is included and addressed in the evaluation.
- The incorporation of Indigenous world views, realities, and ways of knowing in the evaluation design. *(See Unit 4 for more detail on Indigenous ways of knowing.)*
- The evaluator(s) takes the time necessary to develop relationships based on trust and respect.
- Use of culturally-sensitive methodologies and adherence to community cultural protocols.
- The evaluator(s) demonstrates respect for local politics and structures, and recognizes sources of authority in the community.

**4 R's of Indigenous Research**

Indigenous scholars Verna Kirkness and Ray Barnhardt have outlined 4R's for doing research in an Indigenous context. Flip each flashcard to view each.

Respect – Valuing cultural and community knowledge, practising community protocols, listening, being reflective and non-judgemental.
Relevance – Focusing on topics relevant to the community, full inclusion and ownership of community in the evaluation process.
Reciprocity – Knowledge sharing, where both the community and evaluator benefit from a two-way learning process.
Responsibility - Full engagement and participation of the community, working collaboratively and considering all perspectives.

## Section 37

Matching Activity

Match each to the correct principle.

Focusing on topics relevant to the community – Relevance
Full engagement and participation of the community – Responsibility
Valuing cultural knowledge and community protocols, being reflective and non-judgemental – Respect
Both the community and evaluator benefit from a two-way learning process - Reciprocity

## Unit 4

## Section 39

Scenario – Your Practice

Imagine that you are in a budget meeting. You need to make a decision about a program.

Evidence from evaluation should be used to inform policy and practice. But how do you know the results of an evaluation are trustworthy enough to guide your decision-making?

Answer Options:

1. I look for a rigorous experimental design. (Response: While experimental rigor is desirable, it's not always appropriate or feasible for many program contexts. Evaluators strive to balance rigor with the practicalities and contexts of each program.)
2. I look at the evaluation design and context. (Response: Evaluators strive to balance the desire for rigor with the practicalities and unique contexts, cultural and otherwise, of each program.)

## Section 40

Table – Western Science vs. Indigenous Ways of Knowing

| Western Science | Traditional Ways of Knowing |
| --- | --- |
| analytical, based on subsets of a whole | integrated, based on a whole system |
| model- or hypothesis-based | intuitive |
| reductionist | holistic |
| objective | subjective |
| positivist | experiential |
| assumed to be a best approximation | assumed to be the truth |
| secular only | sacred and secular together |
| didactic | teaching through storytelling |
| learning by formal education | learning by doing and experiencing |
| written | oral or visual |
| time is linear | time is non-linear and cyclical |

## Section 41

Flashcard Activity – Proving Cause & Effect

Leaders are often looking for clear evidence of cause and effect-type impact from the evaluation of a program. Although many programs incorporate evidence-informed practices into their design, these practices and their resulting impacts have usually been demonstrated in a rigorous, tightly-controlled research setting.

Think about the evidence-informed practices used in your own programs. How confident are you that these practices are able to fully replicate the desired cause and effect relationships they are intended to?

Very confident – In fact, many theorists and practitioners now question whether replicating simple cause and effect relationships is even possible within a dynamic & complex environment.

Not sure - You're right. Many theorists and practitioners now question whether replicating simple cause and effect relationships is even possible within a dynamic & complex environment.

## Flashcard Activity – Program Context

Discussions regarding credible evaluation evidence also tend to ignore the role of program context.

How confident are you that an evidence-informed program's effectiveness in one context is easily transferred to another?

Very confident – In reality, we're now learning that evidence-informed programs often only effect change under certain conditions.
Not sure - You're correct. Many theorists and practitioners now believe that evidence-informed programs only effect change under certain conditions.

## Flashcard Activity – Program Fidelity

Program fidelity is adherence to a prescribed implementation model that has proven effective in a certain context.

When implementing a new program, is your organization able to fully replicate the original implementation model or do you adapt it to your local context?

Fully replicate model - Many programs must adapt to different populations, settings, and local customs in actual practice in order to be effective.
Adapt to local context - You're right. Many programs must adapt to different populations, settings, and local customs in order to be effective.

## Section 43

### Rigor & Equity

Traditional standards for determining what is credible evidence are simply not appropriate nor attainable for many programs and organizations.

This has far-reaching implications for equity-seeking programs and groups:

1. It risks ignoring the perspectives and lived experiences of the people and communities served.
2. It reduces an organization's ability to find and incorporate "evidence-informed" practices in their programs, which is often a requirement for funding.
3. It reduces their own ability to provide evidence of impact.
4. Lack of evidence of impact can in turn affect their ability to access funding.
5. Lack of funding affects future service delivery for these groups and communities.[3]

## Section 48

### Matching Activity

Match the type of validity to its description.

Internal validity – The ability to determine whether an intervention has in fact caused a particular outcome.
External validity - Indicates how generalizable or applicable evidence is to a broader population.
Construct validity – How accurately the measures used in an evaluation capture the data they purport to measure.

## Unit 5

## Section 50

### Scenario

How often do you practice systems thinking in your role as decision maker?

Answer Choices:

1. A lot. It underlies much of what I think and do on the job. (Response: Systems thinkers use a holistic approach to examine complex and dynamic phenomena and consider how individual parts of a system connect and interact.)

2. Sometimes. I understand what it is, but don't always use it. (Response: Many managers would like to use more systems thinking in their work. Systems thinking uses a holistic approach to examine complex phenomena and consider how parts of a system connect and interact.)
3. Never. I've heard of it, but I'm not sure how it applies to me. (Response: Systems-thinking has many applications for leaders. It examines complex phenomena by considering how individual parts of a system connect and interact.)

## Section 52

**Benefits of Systems Evaluation**

1. Evaluation with a systems lens leads to a broader evaluation scope.
2. A broader evaluation scope leads to more leverage points identified.
3. More leverage points leads to more opportunities for action.

**Fuzzy Logic Models**

Which type of logic model seems most realistic in your work environment?

Traditional Logic Model – Image of a standard linear logic model with Inputs, Activities, Outputs, and Outcomes.
Fuzzy Logic Model – Image of linear logic model but with more external factors with arrows influencing the logic model

**Systems Evaluation Comic Script**

Luisa is the manager of a program that provides home visits to promote child and maternal health. She works with many partner organizations and wants to identify leverage points that might improve the effectiveness of her program. She calls Parm, a well-known evaluator for help.

Luisa: Parm, I know we can provide better service, but I'm overwhelmed by collaborating with so many partners. Do you think a systems evaluation could help?

Parm: Yes! You're right to focus on the broader system in which your program operates. It's critical to understand the relationship among all the partners and how they influence your success.

Luisa: We work with 18 different partners. Sometimes it feels like each group is working on their own.

Parm: Let's start by understanding all the activities they're involved in. We could ask how much they provide direct service, collect data on community needs, and communicate with government and the community.

Luisa: That sounds good.

Parm: Partnerships that work well have shared goals. So let's gather data about the goals of each organization. Let's also find out how these goals are aligned with the other partners and if they change over time.

Luisa: That would be useful!

Parm: We could also gather data on the communication among the different partners. There are tools that can help us understand who talks to whom and how often. This can help manage a complex partnership.

Luisa: This information should give us many leverage points to improve our collaboration and our effectiveness. When can we get started?

## Unit 6

### Section 57

**Scenario – Your Practice**

Think of evaluations recently completed in your organization. How often are the findings fully used?

Answer Choices:

Always. (Response: Congratulations! You recognize that evaluation is a strategic investment, and more informed and effective decision-making is the return.)
Sometimes. (Response: Organizations sometimes experience challenges when trying to implement evaluation recommendations.)
Not that much. (Response: Why do you think this is so?)

## Unit 7

### Section 66

**Scenario**

Choosing an evaluator. Imagine you are launching an innovative new program in your department. You need to ensure this program is evaluated appropriately.

Who will you choose to evaluate this new program?

Answer Choices:

1. Our own internal evaluator(s).
2. An external evaluation consultant.
3. It depends.


Flashcard Activity - Internal vs. External Evaluators

Let's explore the advantages and disadvantages of using internal versus external evaluators.
You will be provided with a series of options. For each pair of options, select the one that best meets the typical evaluation needs of your organization.

Our organization usually needs to:

Build the evaluation capacity of staff – This selection shows a preference for internal evaluators.
Avoid diverting staff from their normal tasks to complete evaluations - This selection shows a preference for external evaluators.

Use someone familiar with our organizational culture and context - This selection shows a preference for internal evaluators.
Use someone with a fresh outside perspective – This selection shows a preference for external evaluators.

Use someone familiar with our staff and specific programs – This selection shows a preference for internal evaluators.
Use someone that staff and funders perceive as more independent and credible - This selection shows a preference for external evaluators.

Use someone who understands implications across departments or programs - This selection shows a preference for internal evaluators.
Use someone with specialized program area knowledge and expertise - This selection shows a preference for external evaluators.


Section 67

Table – American Evaluation Association Standards

| Standard | Definition |
| --- | --- |
| Utility | The extent to which evaluations meet stakeholder needs. |
| Feasibility | The effectiveness and efficiency of evaluations. |
| Proprietary | To ensure that evaluations are conducted legally & ethically. |
| Accuracy | The dependability and truthfulness of evaluation findings. |
| Accountability | Adequate documentation of evaluations and improvement of evaluation processes and products. |

## Section 69

### Sorting Activity – Inadequate Evaluation Budgets

Consider the potential consequences of a poorly-resourced evaluation. Sort these possible consequences into the appropriate pile.

Longer follow-up of program participants – Well-resourced evaluation.
Limited follow-up of program participants – Poorly-resourced evaluation.
Lack of comparison groups – Poorly-resourced evaluation.
Smaller sample sizes – Poorly-resourced evaluation.
Insufficient consultation with intended users, decreasing usability – Poorly-resourced evaluation.
Decreased confidence in using the results for decision making – Poorly-resourced evaluation.
Shorter reports – Neither
Greater reliance on quick and convenient methods that lack credibility – Poorly-resourced evaluation.
Lack of pre-and post-data to establish impacts over time – Poorly-resourced evaluation.
Greater sample selection bias – Poorly-resourced evaluation.
Less valid conclusions and reduced utility of findings – Poorly-resourced evaluation.
Exclusion of important, but challenging to reach program participants – Poorly-resourced evaluation.
Fewer data sources and lines of evidence accessed – Poorly-resourced evaluation.

## Unit 8

## Section 74

### Developing Evaluation Capacity

Click or swipe the arrows below to display ideas for how leaders can further develop evaluation capacity.

1. Championing evaluators and evaluation at all levels of the organization.
2. Modeling evaluative thinking.
3. Educating your peers and colleagues about the value of evaluation.
4. Recruiting evaluative minds.
5. Routinely referencing your organization's "culture of evaluation".
6. Spearheading a formal evaluation capacity-building plan.

### Building a Culture of Evaluation Graphic

30 ideas to apply to your organization:

1. Evaluate the important outcomes only.
2. Position evaluation as a way of giving staff a voice.
3. Position evaluation as a way of showing that management is listening.
4. Involve staff in the process to increase engagement and ownership.
5. Decrease the use of jargon, talk instead in terms of *"evaluation questions we want to answer"* vs. *"outcomes we have to measure"*.
6. Incorporate evaluation accountability into staff performance appraisals and personal development plans.
7. Resource it appropriately (time, money).
8. Offer evaluation training to build capacity.
9. Inject the term "learning organization" into your persuasion efforts.
10. Engage expertise in the area of organizational culture change.
11. Identify and recruit evaluation "champions" at the senior levels.
12. Model evaluation at every opportunity.
13. Consciously recruit and hire "evaluative minds".
14. Bring in a high profile evaluation "expert" to work with your organization.
15. Demystify terms such as "measurement", "monitoring", anything "performance", instead use friendlier ones such as "tracking" or "following".
16. Put more focus on qualitative data, acknowledging staff's fears that not everything can be reduced to quantitative.
17. Emphasize more intrinsic staff motivations, e.g. validation of their work, transferable skill.
18. Emphasize that evaluation is something they can direct, not something that is "done" to them.
19. Be subversive and informally collect data of interest to demonstrate areas needing improvement.
20. Be proactive and develop an evaluation process before it is imposed on you by management.
21. Be clear about who the evaluation is for, i.e. you and not just the funder.
22. Make a practice of scheduling time up front in the program planning and design phase to discuss evaluation.
23. Incorporate evaluation into new staff orientation.
24. Appeal to management's notions of accountability and informed governance/decision-making.
25. Focus on the board's role to request/direct more evaluation.
26. Orient new partners to an increased focus on evaluation.
27. Start with informal, simple evaluations to demonstrate benefits and worth, look for small successes.
28. Acknowledge the evaluation staff does informally and intuitively already.
29. Get the communications staff on-side with the evaluation, as it (can) provide them with positive material to promote about the organization.
30. Invite senior executives to early evaluation planning meetings to get their perspectives on what they would like to see in the evaluation, and their ideas regarding constraints and enablers.


## Section 75

Scenario – Evaluation Policy

Does your organization have an evaluation policy?

Answer choices:

1.  Yes. (Response: Congratulations! An evaluation policy is a key component in building organisation-wide evaluation capacity.)
2.  No. (Response: An evaluation policy is a key component in building organisation-wide evaluation capacity.)
3.  Not sure. (Response: An evaluation policy outlines the role and function of evaluation within an organisation.)