PROJECT EVALUATION GUIDE FOR NONPROFIT ORGANIZATIONS

Fundamental Methods and Steps for Conducting Project Evaluation

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VOLUNTEER BÉNÉVOLES CANADA

Canada Volunteerism Initiative
Initiative canadienne sur le bénévolat

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- University of Regina Seniors' Education Centre, Saskatchewan
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- Canadian Cancer Society (CCS) PEI Division
- Yukon Learn Society
- The Boys and Girls Club of Niagara, Ontario
- Canadian Red Cross Newfoundland and Labrador

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ABOUT THIS GUIDE

This guide is designed to assist charitable and nonprofit organizations to conduct precise and appropriate project evaluations, and then communicate and use the results of evaluation effectively. Its primary focus is to help organizations that would like to perform project evaluations by using their internal resources, and to make evaluation a part of their project management and strategic development.

The guide is the result of three years of work with charitable and nonprofit organizations across Canada with the purpose to evaluate a wide variety of community-based projects funded by the Community Support Centre, a part of the Canada Volunteerism Initiative (CVI). Most of the forms and templates included here were initially used by these organizations and then, based on their feedback, revised for this guide.

The four training modules that are described in this guide contain the essential information and steps to complete any type of project evaluation. They are:

- Module One, which explains all steps you need to create an evaluation plan.
- Module Two, which focuses on how you can implement the evaluation plan and gather evaluation data.
- Module Three, which explains data analysis and interpretation of results.
- Module Four, which provides suggestions for communicating the evaluation results.

Although you can use these four modules in any project evaluation, you may need to adjust the steps and details for each evaluation depending on the type of evaluation you require and the context, budget, and time frame of your project. For example, you can review the planning section (Module One) to obtain a clear understanding of the context, goals, and background of the project you want to evaluate, and the needs and purposes for evaluation. Based on your work in this module, you can review the other steps in this guide and determine the ones that are applicable to your project, the ones that need further modifications and revisions, and the ones you can skip.

For more information, see the References and Suggested Reading Materials. Most of the terms that are in *italic type* are defined in the Glossary.

This guide is prepared for staff and internal evaluators. Some sections may not be applicable for external evaluators and contractors.

Evaluation is an important tool that your organization can use to demonstrate its accountability, improve its performance, increase its abilities for obtaining funds or future planning, and fulfill the organizational objectives. By communicating the results of the evaluation, your organization can inform its staff, board of directors, service users, funders, the public, or other stakeholders about the benefits and effectiveness of your organization's services and programs, and explain how charities work and how they are monitored. Although there are many benefits in conducting evaluation, it will be a waste of your organization's resources if the evaluation results are not used.

The purpose of evaluation is to provide information for actions such as decision-making, strategic planning, reporting, or program modification. Project evaluation helps you understand the progress, success, and effectiveness of a project. It provides you with a comprehensive description of a project, including insight on the

- needs your project will address;
- people who need to get involved in your project;
- definition of success for your project;
- outputs and immediate results that you could expect;
- outcomes your project is intended to achieve;
- activities needed to meet the outcomes; and
- alignment and relationships between your activities and outcomes.

Evaluation is a systematic investigation of the worth or significance of an *object*.[1] Evaluation normally involves some standards, criteria, measures of success, or objectives that describe the value of the object. Evaluation can identify criteria for success, lessons to learn, things to achieve, ways to improve the work, and the means to move forward.

Project evaluation assesses activities that are designed to perform a specified task in a specific period of time. For example, a three-day workshop on volunteerism, a one-year fundraising program, a three-year HIV prevention intervention, a five-year career development innovation, or an ongoing newcomer youth orientation and integration training program are all projects that you can evaluate.

[1] Scriven, M. 1991

Project evaluation and project management are interrelated. Evaluation can help you complete a project successfully, provide evidence of successes or failures, suggest ways for improvements, and inform decisions about the future of current and planned projects.

Project evaluation is an *accountability* function. By evaluating a project, you monitor the process to ensure that appropriate procedures are in place for completing the project on time, and you identify and measure the outcomes to ensure the effectiveness and achievements of the project. All these efforts make your organization capable of reporting, answering all inquiries, and being accountable for its plans.[2]

You can use the **results of a project evaluation** to

- identify ways to improve or shift your project activities;
- facilitate changes in the project plan;
- prepare project reports (e.g., mid-term reports, final reports);
- inform internal and external stakeholders about the project;
- plan for the sustainability of the project;
- learn more about the environment in which the project is being or has been carried out;
- learn more about the target population of the project;
- present the worth and value of the project to stakeholders and the public;
- plan for other projects;
- compare projects to plan for their futures;
- make evidence-based organizational decisions;
- demonstrate your organization's ability in performing evaluations when searching for funds; and
- demonstrate your organization's concerns to be accountable for implementing its plans, pursuing its goals, and measuring its outcomes.

This guide is designed to help your organization evaluate your projects and use the evaluation results. The four training modules are designed to provide you with a complete process for planning, implementing, analyzing, and sharing the results of your evaluation.

[2] Wagner, B. 1989 and Alkin, M. 1972

In Module One you will learn about

- writing a project description;
- stating an evaluation purpose;
- identifying evaluation stakeholders;
- choosing evaluation questions;
- selecting evaluation types;
- choosing evaluation tools;
- identifying evaluation sources; and
- identifying evaluation budget.

In Module Two you will learn about

- engaging an evaluation group;
- assembling skilled staff;
- increasing organizational support;
- understanding ethical conduct for evaluations;
- using your evaluation plan;
- identifying evaluation indicators;
- monitoring your project activities
- finding existing evaluation tools;
- developing evaluation tools; and
- managing data collection.

In Module Three you will learn about

- understanding quantitative and qualitative data;
- preparing data for analysis;
- checking the accuracy of data;
- analyzing data; and
- interpreting the results of your analyses.

And in Module Four you will learn about

- using the evaluation results;
- preparing an evaluation report;
- presenting the results in person;
- using media to communicate the evaluation results.

MODULE 1

Creating an Evaluation Plan

Creating an evaluation plan is the very first stage of conducting an evaluation. This module explains the essential steps to help you create an evaluation plan for your project. Your plan should answer questions such as:

- What is being evaluated?
- Why is it being evaluated?
- Who wants the evaluation?
- Who will do it?
- How will it be done?
- What results do you expect?

By the end of this module, you will have a project evaluation plan. You can share this plan with internal and external *stakeholders* when inviting them to participate in the project or in its evaluation. Your plan will be a working document that you should revisit and revise periodically.

Writing a Project Description

Understanding a project is crucial to evaluating its progress or *outcomes*. You should create a project description that includes

- the needs and objectives that the project will address;
- the target group that will take action in this project;
- the target group that will be affected by the project;
- the planned outcomes of the project; and
- the activities that are required to meet those outcomes.

You should be able to find this information in the project proposal or in related project documents such as reports and minutes of meetings.

If you do not have enough information to complete your description, talk to the project managers to determine their understanding of the project. Use the outline above to prepare a set of questions for the managers.

Stating an Evaluation Purpose

The purpose statement presents the reasons that led you to conduct this evaluation, so you should already have the information you need to prepare it. As an evaluator, you only need to clarify and write it as a statement. This statement should echo the goals, values and significance of the project from either its funder's or your organization's perspectives (see Exhibit 1).

The evaluation purpose statement can also determine the type of evaluation you undertake. If the purpose is to demonstrate how the project is meeting its objectives, using its resources, and whether any modifications in its process are required, you should conduct a *process evaluation*. If the purpose is to assess the extent to which the project has affected its participants or environment, then you should conduct an *outcome evaluation*. The types of evaluation will be explained in **Selecting Evaluation Types**. The purpose statement will also help you write the appropriate evaluation questions, which you will learn more about in **Choosing Evaluation Questions**.

If the purpose of evaluation is not clear, contact the project manager and senior staff to find out how they view the importance of the evaluation, how they would like to use the results, and the information that would be useful to them.

Examples of Evaluation Purpose Statements

- To assess the degree to which project objectives were achieved.
- To document the lessons learned.
- To provide recommendations for project development and improvement.
- To examine the changes that resulted from doing the project.
- To provide input to guide decision making for the upcoming renewal and extension of project funding.

Exhibit 1: Purpose of Evaluation

Volunteering for Healthy Retirement

The University of Regina Seniors' Education Centre received funding to conduct a one-year (2004-2005) pilot and demonstration project about healthy retirement:

- The mission of the Centre is to provide programs that stimulate participants' intellectual, emotional, and physical well being to enrich their lives.
- The project goal was to enable older adults to have satisfying volunteer experiences, thereby increasing the number of volunteers among those nearing retirement.
- The Community Support Centre of the Canada Volunteerism Initiative funded this project to find a new way to promote volunteerism among older adults. The funder asked for an evaluation and provided tools, assistance, and advice.

The purpose of the project evaluation was to assess the participants' perception of the project activities, identify the project's longer-term impact, and monitor the activities to demonstrate the project's success.

Identifying Evaluation Stakeholders

Stakeholders are the individuals or organizations that have an interest in your project; they may make decisions, participate in the project activities, or be affected by those activities. Your project may have both **primary** and **secondary** stakeholders. The primary stakeholders are those who are closely and directly involved in or affected by the results of your project (e.g., the participants themselves and an organization that has invested in your project). Secondary stakeholders are those who are less involved and less affected by your project but may have some benefits in your project (e.g., an organization that is interested in knowing about the results of your project).

Identifying the evaluation stakeholders can help you establish the relationships and networks necessary to successfully complete your evaluation. It can also help you decide who to approach, how to approach them, and what you should expect from them. And it can help you develop useful evaluation products (e.g., reports) that are written in the most appropriate language for your stakeholders.

How to identify evaluation stakeholders ◄

1. Prepare a list of the individuals and organizations that have interests in the project and its evaluation.
2. Determine their interests in this project and its evaluation.
3. Identify their information needs, particularly from this evaluation.
4. Identify their level of involvement in the project, based on their needs and interests.
5. Identify potential evaluation participants (i.e., primary stakeholders).
6. Invite participants to be part of the project evaluation group (see Module Two).
7. Identify the potential users of the products of this evaluation (i.e., secondary stakeholders).

Examples of Primary Stakeholders

- Project team members
- Project participants
- Funder(s)
- Your management staff
- Your board members
- Your volunteers

Examples of Secondary Stakeholders

- Members of the community in which the project is being conducted
- Members of the project's target population (e.g., youth, seniors, new citizens)
- Your organization's external members or partners
- Associations related to the topic of your project

Selecting Evaluation Types

Selecting an evaluation type provides direction for your evaluation. It helps keep the evaluation process focused on its main purpose and determines the evaluation questions that should be answered and the data that should be collected. The most common types of evaluation are: formative, process, summative, and outcome.

Formative evaluation is an ongoing evaluation that starts early in a project. It assesses the nature of the project, the needs the project addresses, and the progress and implementation of the project. It can identify major gaps in the project's content and operational aspects (i.e., what was done and how) and suggest ways to improve them.

Process evaluation is used to monitor activities to make sure a project is being implemented and completed as designed and on time. It can be complementary to formative evaluation.[3] Although formative evaluation has a larger scope than process evaluation, there are many similarities between them: both focus on the effectiveness and the operational aspect of a project; both start at a very early stage of a project and can be performed by internal staff; and both require a strong monitoring mechanism to track operational activities and to collect information related to the process (see **Monitor Your Project**).

Summative evaluation is an overall assessment of the project's effectiveness and achievements. It reveals whether the project did what it was designed to do. It provides information for future planning and decisions and usually is completed when the project is over. This type of evaluation usually does not directly affect the current project, but it helps stakeholders decide the future of this or similar projects. To provide adequate information, a summative evaluation requires a set of well-defined goals and objectives for the project and a plan that keeps the focus of evaluation on the end-results. This type of evaluation should be conducted by either an external evaluator[4] or by staff and practitioners who are well equipped with the required knowledge, resources, and tools for this type of evaluation.[5]

[3] See Eng, T. et al., 1999 and Dehar, M. 1993 for examples
[4] Bradbeer, J. 1999
[5] Oliver, M. 2000

Outcome evaluation assesses the extent to which a project has achieved its intended effects, and other effects it could have had on the project's participants or the environment. It focuses on immediate, intermediate, or ultimate outcomes resulting from the completion of the project. The results of this evaluation should identify both the desirable and undesirable impacts of the project. Similar to summative evaluation, outcome evaluation can also determine if the needs that inspired the project were satisfied, or if they still exist. To conduct this type of evaluation, you first need a good understanding of the project process, the outcomes, and the relationship between the two. Then, you need to collect sufficient evidence during the project to demonstrate how certain outcomes are related to a specific set of project activities. In this type of evaluation, identifying evaluation indicators, collecting appropriate data, and interpreting the results are crucial as well as challenging; see United Way of America, 1999 & The Urban Institute, 2004 for more information.

How to select an evaluation type ◄

You can select the evaluation type based on

- The objectives and priorities of your project
- The purpose of the project evaluation
- The nature of the project (i.e., whether it is process-oriented or outcome-oriented)
- The time frame for conducting the evaluation (i.e., during or after the project)
- How, and by whom, the results will be used
- The time frame and budget for completing the evaluation.

Exhibit 2: Types of Evaluation

Murray (2004) mentions four dimensions for identifying the type of evaluation:

1. The object or individual that is being evaluated (i.e., evaluand), for example, project, organizational, and personnel evaluation.

2. The focus of evaluation, for example, process, outcome, impact, formative and summative evaluation.

3. The method of evaluation, for example, qualitative evaluation and goal-free evaluation (i.e., evaluation without any specific descriptions or assumptions).

4. The involvement patterns of those who do evaluation, for example, participatory, empowerment, and multi-vocal evaluation (i.e., involves sharing perspectives in evaluation).

Patton (2002 & 2006) also refers to another dimension

5. The use of evaluation, for example, democratic evaluation (i.e., using evaluation to facilitate conversation), utilization evaluation (i.e., designing an evaluation that has an intended use by intended users), and developmental evaluation (i.e., conducting an evaluation in accordance with a developmental innovative project to provide feedback and support decision making in the process of the work).

Choosing Evaluation Questions

Evaluation questions are the key questions that you need to answer to ensure the successful completion of your project or to understand its impact, effectiveness, and achievements. These questions determine what is important to be addressed or assessed. They direct you to the type of evaluation that is required (see Module Two for details on evaluation types). Asking and answering the right questions will lead to useful evaluation results that can be easily communicated with external audiences or put to use in your organization.

Evaluation questions play a crucial role in the analysis and interpretation of the data you collect. Therefore, you should allow for enough time and discussion with your key stakeholders to develop and select them. You may also need to revisit and revise these questions, or add new ones as the project is unfolding.

How to choose evaluation questions ◄

1. Review the objectives, activities, and anticipated outcomes of the project.
2. Ask your stakeholders what questions this evaluation should answer.
3. Identify the level of details that are required for this evaluation (e.g., whether the evaluation should be designed based on the individual activities or components of the project).
4. Prepare a list of questions to determine the value and significance of various aspects of the project.
5. For each question, identify whether it relates to the process of the project, to its *outputs* and immediate results, to the outcomes and changes the project could create for its participants and environment, to the lessons learned and points that can affect future planning and decision making, or to the new ways of work and innovations (for more information, see **Selecting Types of Evaluation**).
6. Select questions that are directly associated with at least one project objective. Their answers can verify the project's achievements or success.
7. Select questions that are related to the future of the project. Their answers can lead to ways to make the project – and other projects – sustainable.

Examples of Evaluation Questions

Evaluation questions related to process:

- Are the activities being performed as planned?
- Is the project reaching the intended target population?
- How satisfied are the participants with their involvement in this project?
- How should the planned activities be modified to work better?
- What lessons can we learn from the way in which the project is unfolding?

Evaluation questions related to outputs:

- Is the project reaching the intended number of participants?
- Is the project providing the planned services?
- Are the activities leading to the expected products?
- Are there any unexpected products?

Evaluation questions related to outcomes/impacts:

- Did the participants experience any changes in their skills, knowledge, attitudes, or behaviours?
- What changes were expected?
- What are the effects of the project on my organization (e.g., organizational pride, enhanced networking, and partnerships)?
- Did the project meet the needs that led to this project? Do those needs still exist?
- Are there any other related needs that have arisen that the project did not address?
- Did we experience any changes as a result of the project? Are the changes positive?
- What could be the long-term impacts of this work?

Evaluation questions related to alternatives and lessons learned:

- What could have been done differently to complete the project more effectively?
- What key changes should be made to the project to enhance achievement of objectives?
- What are the lessons learned for the future?
- What outcomes should be considered if an organization wants to repeat this or conduct a similar project?

Exhibit 3: Evaluation Questions

Fostering Youth Activity in Charitable and Nonprofit Organizational Culture

In 2005-2006, The Heartwood Centre for Community Youth Development conducted a pilot and demonstration project that focused on promoting meaningful contributions by youth volunteers. The project goal was to make full use of youth volunteers by fostering youth-led activities.

The objectives of the project were to

1. Solicit and build a relationship with two organizations as pilot sites and work with them to evaluate and shift their cultures.

2. Introduce the concepts of youth inclusion and community youth development as a framework and guide for the organizations to explore their organizational cultures.

3. Start and support the two pilot sites in their process of building relationships with youth.

4. Develop tools and learning resources from the pilot sites to share with the larger community.

The potential evaluation questions were

- **How successful was the process for selecting two organizations as pilot sites?**
- **How adequate were the tools, models, resources, and the process that helped the organizations engage youth volunteers? Could it be done differently?**
- **Was the project able to identify conditions and circumstances for building relationships with youth?**
- **What are the effects of this project on the two pilot sites? Were they able to shift their cultures adequately?**

Choosing Evaluation Tools

Evaluation tools help you gather the information you need to answer your evaluation questions. They can be different from the tools you use to carry out the core activities of the project (see Exhibit 4). For example, conducting *workshops* to train organizations about youth volunteers is a project tool; *interviewing key* participants to ask their opinions about the content and success of the training workshops is an evaluation tool.

Evaluation tools can use both formal and informal methods for gathering information. Formal evaluation tools include focus groups, interviews, survey questionnaires, and knowledge tests. Informal evaluation tools include observations, informal conversations, and site visits.

Depending on your evaluation questions, you may need a tool that helps you gather quantitative information by numbering, rating and ranking information. Or you may need a tool that helps you gather qualitative information such as stories, anecdotes, opinions about a particular aspect of the project, or observation notes. See Module Three for more information about quantitative and qualitative data and Table 1 for a list of evaluation tools, their descriptions, and their types.

How to choose evaluation tools[6] ◄

1. Review your evaluation questions and project activities.
2. Complete a copy of the *Evaluation Tools Matrix* provided in Appendix 1.
   a. Enter your evaluation questions in the first column.
   b. Think about the information you need to answer these questions.
   c. Check the tools required for gathering the necessary information to answer each question.
   d. Identify whether the tools are available and need modification, or if you need to develop them.
   e. Think about the information that you can gather by using each tool. You may use a tool to address more than one question.
3. Discuss your completed matrix with the evaluation group and project team.
4. Learn more about the selected tools and, if necessary, make sure that there are enough internal resources (i.e., time, skills, and budget) to develop them.
5. Search for external resources and learning materials if the internal resources are insufficient.

[6] See **Module Two** for information on developing tools.

Exhibit 4: Evaluation Tools

Enhancing Volunteer Capacity through Support and Recruitment Initiatives

In 2004-2005, the Canadian Cancer Society (CCS) PEI Division, with the support of Community Support Centre funding from the Canadian Volunteerism Initiative, looked critically at its volunteer program and examined ways to enhance relationships and communication with its rural volunteers, and to develop strategies for engaging youth volunteers.

The core activities of the project were

- Literature review on rural volunteers and youth volunteers
- A Canadian Cancer Society cross-country volunteer survey
- Focus groups with unit volunteers in the provincial regions
- Youth focus groups with high school and university-level students
- One-to-one interviews with volunteers
- Focus groups and interviews with CCS staff
- Volunteer Fairs
- Development of a Volunteer Wall of Fame
- Volunteer conference

The following evaluation tools were used to collect data within the project time frame:

1. Evaluation forms for focus groups with volunteers, staff, and youth.
2. Monitoring activities to identify the strengths and challenges of each one (e.g., literature review, one-on-one interviews, Wall of Fame). This information was shared with the Volunteer Manager on a weekly basis to obtain feedback and make adjustments as necessary.
3. Evaluation forms for volunteer conference workshops.
4. Volunteer satisfaction survey.

Table 1: Evaluation Tools

Evaluation Tool	Brief Description of Tool	Types of Tool			
		Formal[7]	Informal[8]	Quantitative	Qualitative
Survey[9]	A set of predetermined questions about certain topics that are answered by a target audience.	X		X	
Interview[10]	A set of questions (could be predetermined or not) about certain topics that are posed to a target audience and followed by additional questions and conversations.	X			X
Knowledge/ Skill Tests	A set of questions that determine the level of knowledge or skills in project participants.	X		X	
Focus Group[11]	Group discussions with a relatively small number of selected people about certain questions.	X			X
Evaluation Form	A set of questions that determine the participants' opinions, attitudes, and understanding once a project activity is complete.	X		X	
Journal Recording	Self report of daily activities by project participants.		X		X
On-site visits	A combination of observation and interviews that occur in the project's environment.		X		X
Activity Log	Staff report of daily activities.	X		X	
Observation notes	Notes taken through direct observation of verbal and nonverbal behaviours that occur in project activities.		X		X
Documentation	Administrative records of project activities (e.g., reports, minutes of meetings, registration forms).		X	X	X
Anecdotal records	Stories and narratives about an event, an experience, or an individual, described by project staff or participants.		X		X

[7] Formal tools have relatively specific structures and content, and must be developed or modified if they have been used for other projects.
[8] Informal tools have relatively flexible content and structures, and can usually be obtained by reviewing, tracking, and organizing project or evaluation activities.
[9] Survey may include some open-ended (qualitative) questions. See Appendix 5 *Understanding Survey Research Methods* Tip Sheet.
[10] Interview may include some close-ended (quantitative) questions. See Appendix 5 *Interviewing for Research* Tip Sheet.
[11] See Appendix 5 *Understanding Focus Groups* Tip Sheet.

Identifying Evaluation Sources

Evaluation sources are the materials or people that will help you gather information. These can include the project documentation and files, and the project participants, staff, and members of a committee. Your evaluation plan should specify these sources and explains how and when you approach these sources.

To identify evaluation sources, you need to review the evaluation tools that are required for this evaluation and decide to whom these tools must be applied (e.g., workshop participants). If you have a large number of sources and need to sample them, you should also explain the sample size, process, and criteria for selection.[12]

Identifying Evaluation Budgets

Project evaluations can be costly, particularly if they aim to capture various aspects of both the process and outcomes of the project. You should plan your budget in a way that makes your evaluation realistic, manageable, efficient, and productive. In some cases, projects have a fixed budget and evaluators need to adjust their activities to that budget. In other cases, evaluators need to develop a budget. Table 2 shows an example of evaluation budget and Appendix 2 provides a template for creating a budget.

How to identify an evaluation budget ◄

If the budget has been already determined in the project expenditure, before planning the evaluation, you need to

1. Identify the source of funding and the budget contact.
2. Find out if the budget is flexible or fixed.
3. Discuss the details of the evaluation with project managers or funders, and generate consensus about the purpose, scope, and the end results that fit into the budget.
4. Propose high-priority activities that you can complete within the available budget.
5. Identify the evaluation activities, tools, and information resources that won't add extra costs.
6. Prepare an agenda for negotiating items that cannot be covered by the available budget.
7. Prepare your evaluation plan based on the agreed elements, priorities, and discussions.

[12] See Appendix 5 *Understanding Survey Research Methods* Tip Sheet.

If you need to create an evaluation budget, you should

1. identify the source of funding and budget contact,
2. identify the maximum budget available,
3. prepare your evaluation plan, and
4. prepare a budget that breaks down the costs based on the format of your organization or the funding organization's needs.

Table 2: Example of Budget for a One-Year Project Evaluation

Activity	Position in Charge	Number of Days	Cost per Day	Total Cost
Evaluation Management and Direction	Internal Evaluator	7	$	**Subtotal $**
Evaluation Planning				
Contact stakeholders for assembling an evaluation group	Internal Evaluator	3	$	
Hold planning meetings with the evaluation group	Internal Evaluator/group	2	$	
Develop a draft of evaluation plan	Internal Evaluator	2	$	
Discuss and revise the evaluation plan	Internal Evaluator	1	$	
		Total Days: 8		**Subtotal $**
Evaluation Implementation (Develop tools and gather data)				
Recruit staff	Internal Evaluator	3	$	
Identify and organize existing tools	Staff	3	$	
Develop a monitoring system	Internal Evaluator	4	$	
Implement and maintain the monitoring system (periodically)	Staff	7	$	
Develop new evaluation forms and interviews	Internal Evaluator	2	$	
Test the newly developed tools	Staff	1	$	
Implement the tools and gather data	Staff	7	$	
		Total Days: 27		**Subtotal $**
Information Analyses				
Prepare data for analyses	Staff	2	$	
Analyze data and interpret results	Staff	5	$	
Professional and Technical Support (if required)	External	1	$	
Interpret results	Internal Evaluator	2	$	
Hold discussion meetings with the evaluation group	Internal Evaluator/group	1	$	
Complete interpretation of results	Staff/Internal Evaluator	1	$	
		Total Days: 12		**Subtotal $**
Communication (prepare materials and communicate)				
Prepare and review an evaluation report	Staff/Internal Evaluator	5	$	
Prepare a presentation	Staff	1	$	
Prepare other media-related materials	Staff/Internal Evaluator	5	$	
Present results to various stakeholders	Internal Evaluator	2	$	
		Total Days: 13		**Subtotal $**
Travel and Meetings				
Related to the evaluation group			$	
Other			$	
				Subtotal $
Operating Expenses				
Photocopying/Printing				
Courier				
Phone/Fax				
				Subtotal $
		Total Days: 67		**Total $**

COMPLETING THIS MODULE

In this module, you learned about

- writing a project description;
- stating an evaluation purpose;
- identifying evaluation stakeholders;
- choosing evaluation questions;
- selecting evaluation types;
- choosing evaluation tools;
- identifying evaluation sources; and
- identifying evaluation budget.

By the end of this module, you should have completed

- an evaluation budget;
- a list of evaluation questions;
- the type of evaluation you should conduct;
- a matrix of the evaluation tools you should use; and
- a description of evaluation sources required.

Now you are ready to take the last step of this module – developing the first draft of your evaluation plan using the template in Appendix 3. This plan can make it easier for you to communicate with internal and external stakeholders when you invite them to participate in the evaluation. Your plan should be a working document and it may be revised periodically. At the end of the evaluation, you can use this plan to create an evaluation report (see Module Four, for more details).

MODULE 2

Implementing Your Evaluation Plan

This module explains how to implement the evaluation plan you developed in Module One. It covers fundamental issues such as

- how to engage an evaluation group;
- how to acquire skilled staff;
- how to obtain support from your organization;
- what are the evaluation ethical codes;
- how to identify evaluation indicators;
- how to develop/prepare evaluation tools; and
- how to manage data collection.

By the end of this module, you should have the necessary evaluation data to do an analysis of your project evaluation.

Engaging an Evaluation Group

Once you have the first draft of your evaluation plan, you need to establish an evaluation group that consists of three to six staff, project manager, and few other stakeholders. Check the list of stakeholders that you prepared in Module One. The evaluation group will assist you through the evaluation by

1. reviewing the progress of the work;
2. providing advice;
3. providing solutions to the issues that may raise; and
4. supporting the use of the evaluation results.

Contact some of the individuals you have identified in your evaluation plan as stakeholders and invite them to participate. Explain their roles and the amount of time you will need them to spend on this task.

How to engage the evaluation group ◄

As you assemble your group, consider when they will get involved in the evaluation:

1. **At the beginning**: The entire group should review and discuss the first draft of the project evaluation plan. The group should also reach a collective understanding of
   - the definition of success for the project;
   - the definition of evaluation terms (e.g., process, activity, outputs, outcomes, impact);
   - the purpose and values of the project and its evaluation;
   - their expectations for this evaluation;
   - the products and end-results of this evaluation; and
   - the required qualifications and skills for completing this evaluation.

2. **When gathering information**: Some or all members of this group may be contacted periodically to contribute to the evaluation activities or provide their expert advice.

3. **At the end**: The entire group will review and discuss the first draft of findings, will complete interpretations and conclusions, and will provide recommendations that are actionable.

Assembling Skilled Staff

Having skilled staff significantly affects the quality and pace of your project evaluation. Choose the skills you need based on the scope of your evaluation, your evaluation tools, and the collected data. Then, discuss with the evaluation group and your organization about the possibility of having appropriate staff join the evaluation group.

You may decide to recruit a skilled volunteer to assist you. Also, search for training materials or learning opportunities for any staff who is interested and available to learn about evaluation.

Examples of Evaluation Skills

- understanding of the concept and methods of evaluation;
- understanding of the applied research;
- planning and monitoring;
- data analysis;
- data collection and data management;
- results interpretation;
- analytical thinking;
- critical thinking; and
- report writing.

Increasing Organizational Support

Project evaluation requires a co-operative and collaborative atmosphere in your organization, and financial and technical support. You cannot complete a project evaluation without the support and understanding of senior management and other staff; you may need to approach them for help in gathering information, monitoring activities, or addressing any barriers you face while evaluating the project.

Examples of Organizational Support Required for Evaluation

- Management support: To provide resources and to assist in decision-making and modifications when facing challenges. Also, to support the use of evaluation results.
- Other staff support: To implement the evaluation plan.
- Climate of trust: To gather adequate and correct data.
- Technical support: To use appropriate software for developing tools and analyzing data. Also, to use online technologies for communication.

How to increase organizational support ◄

Here are some tips for increasing organizational support:

- Let other staff members know about the project's evaluation and its activities.
- Highlight the benefits that your organization can achieve from conducting an evaluation and how it will pay off.
- Explain the usefulness of the evaluation and how it can facilitate or improve the work of staff.
- Create or explain the positive links between your project evaluation and other functions of your organization (e.g., fundraising, marketing, communications).
- Create a learning environment around evaluation.
- Clarify the purpose of evaluation and the use of its results.
- Share the evaluation results.

Understanding Ethical Conduct for Evaluations

As you implement your project evaluation, you may encounter ethical issues related to the topic of the project, the project funder(s), the readiness of your organization for evaluation, or the organizational policies or procedures with which the project might be associated. Other ethical considerations could be related to the project participants or the tools you use for gathering data.

You need to

1. Prepare a set of guidelines for conducting your project evaluation.
2. Share it with the evaluation group, staff, and other members of your organization.
3. Make sure that the ethical guidelines are followed when conducting the evaluation.

Examples of Ethical Considerations When Conducting Evaluations

- Disclose any conflict of interest that you or any member of the evaluation group may have.
- Clarify your staff's and your own credibility and competence in undertaking the evaluation. Anticipate your collective shortcomings, and ask for solutions and help to mitigate them.
- Be aware of any substantial risks that this evaluation may pose for various stakeholders and discuss them with the evaluation group.
- Remain unbiased and fair in all stages of evaluation. Make sure that your personal opinions toward a group, topic, or social matter will not interfere with your evaluation work.
- Be ready to negotiate when dealing with various stakeholders and their expectations.
- Be clear and accurate in reporting the evaluation results, and explain the limitations of the work and recommendations for improvements.

Examples of Ethical Considerations When Collecting Data

- Inform participants about the purpose of data gathering and how you will use and analyze data.
- Tell participants how the results will be used and any potential negative consequences.
- Explain to participants about data privacy and confidentiality and how it will be protected.
- Obtain consent forms if you think that identifying a respondent might be necessary.
- When analyzing or reporting the qualitative data, be careful about sensitive comments or those that may reveal personal identities.
- Obtain necessary permission when approaching children, institutions (e.g., hospitals, universities), or other sensitive groups for data.
- Understand the participants' cultural norms before approaching them for data.
- Consider offering incentives for participants – both people and organizations – such as providing some feedback or a summary of the evaluation results.

Using Your Evaluation Plan

The project evaluation plan is a living internal document that you should use as a map to guide your evaluation activities. During implementation, you and your evaluation group should periodically review the plan and modify it as necessary. The evaluation group must think critically about the plan's components to ensure that they are still practical and consider any changes or barriers the project may be facing.

Identifying Evaluation Indicators

Indicators are measurable factors or evidence that shows the extent of the project's progress, success, or achievements. Identifying indicators can help you in collecting useful data and in your search for required evaluation tools and information sources.

Indicators can be quantitative, such as the number of participants, number of website visits, and rate or rank of opinions. They can also be qualitative, such as positive or negative feedback, problems, complaints, and comments. You can also use some project outputs as indicators if they show the project's progress toward an objective. For example, if one of your objectives is to provide other organizations with a volunteer training tool kit, a complete version of this kit is an output that indicates your project's progress.

How to identify evaluation indicators ◄

1. Review the project objectives and think of the information and evidence 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 anticipated project outcomes and think of the information and evidence that ensure those outcomes occur, or indicate the efforts in moving toward them.
5. Review the project outputs and determine how they can represent the project's progress and achievements.
6. Specify any evidence for the project claims or achievements.

If there is a large number of indicators that you think may sidetrack the evaluation process, prioritize them and select those that are most relevant to your evaluation questions and objectives and are easy to measure.

Examples of Evaluation Indicators

Quantitative indicators

- Response rate to an advertisement, announcement, etc.
- Number of visits to the project website
- Number of inquiries
- Participants' level of satisfaction or engagement (e.g., 1 to 4 scale)
- Frequency of communications
- Number of resources used
- Percentages related to the use of various services
- Average age or education of respondents to an advertisement
- Knowledge test scores or ranks

Qualitative indicators

- Types of responses to an advertisement, announcement, etc.
- Types of inquiries
- Feedback on the effectiveness of services, benefits of a program, comprehensiveness of materials, etc.
- Observable changes in attitudes, behaviours, skills, knowledge, habits, etc.
- Types of communications
- Types of problems, complaints about services, programs, etc.
- Types of resources used
- Participants' perceptions of the project programs, services, etc.

Outputs as indicators

- Number of workshops held
- A Volunteer Fair held
- Number of volunteers trained
- Number of charitable or nonprofit organizations engaged
- A published manual
- Website
- Training tool kit or workshop tool kit

Exhibit 5: Evaluation Indicators

Volunteer Management in the North

In 2004-05, the Yukon Learn Society received funding to complete a project to increase the capacity of rural communities in the north. The goal was to build and maintain volunteer capacity by creating a plain-language culturally significant resource and community workshop. To identify the indicators required to measure the completion and success of the project, the following project objectives, activities, and evaluation questions were reviewed:

Project objectives:

1. Identify volunteer management practices relevant to northern remote First Nations communities.
2. Provide a culturally and regionally relevant resource to Yukon communities.
3. Train communities in volunteer management through a workshop.
4. Provide a usable resource to communities and organizations across Canada.

Project core activities:

1. Research existing materials about volunteerism in rural/remote communities.
2. Contact First Nations representatives to identify the most important aspects of volunteering from their perspective.
3. Identify the applicability of the gathered information through an audit by community and First Nations representatives.
4. Produce a plain-language culturally appropriate manual on volunteer management.
5. Travel to all 14 Yukon communities to offer an interactive workshop on the basics of volunteer management.
6. Identify organizations in the Yukon and across the country that might be interested in receiving/using the resource.

Evaluation questions:

1. Did we properly identify the problems rural First Nations communities face when working with volunteers? Was the process for gathering information successful?
2. What was the target communities' feedback on the topic? Were they ready?
3. Did we create a culturally and regionally appropriate resource?
4. Was the workshop appropriate for the audience and did participants feel it was useful?
5. Did the manual contain useful/applicable information about volunteer management? Will Yukon organizations use the resource?

The following indicators were identified to measure the completion and success of this project:

1. Number and types of resources discovered that provide information on volunteer management relevant to northern and remote communities.
2. Identified problems of First Nations communities when working with volunteers.
3. Number of community contacts for this project.
4. Positive and negative feedback on
   - **a)** the topic and the applicability of it;
   - **b)** the process for the production of the volunteer management resource (i.e., plain language and culturally appropriate);
   - **c)** the usability of this resource by the target communities (i.e., individuals and organizations); and
   - **d)** the training workshop materials (i.e., easy to understand and interactive).
5. Number of community members trained through workshops.
6. Workshop participants' overall feedback.
7. Distribution of the resource in Yukon and across Canada.
8. Increase in the visibility of the volunteer sector in Yukon communities.
9. Increase in awareness of volunteer management and volunteerism among chiefs, municipal leaders, and other policy makers in rural Yukon communities.
10. Number of inquiries/requests for the resource.

Monitoring Your Project

A monitoring mechanism ensures that your project's planned activities are being completed in a timely fashion. This mechanism is, in fact, part of the project management and provides useful information for any type of evaluation. The mechanisms you choose should track and save the information that demonstrates the progress and completion of the project over time. Table 3 presents an example of a monitoring mechanism – a complete monitoring form. Appendix 4 contains two templates for monitoring two different types of project activities.

Examples of Monitoring Mechanisms

- An electronic filing system to organize all communications, reports, minutes of meetings, and any other existing documents that can help you keep track of your project activities.
- Document logs, including activity logs, to track the events and progress of the project activities, and contact logs to record the time and details of contacts.
- Tracking software for project documents or recording website and other technology-related project activities.

Finding Existing Information and Tools

As mentioned in Module One, you can search for any existing sources of information and tools to be modified and used in your evaluation. This can reduce the time and cost of your evaluation and make it more manageable.

There are some sources of information that exist as part of organizational or project operations, including organizational reports, existing databases, financial records, project documents (e.g., minutes of meetings, log diaries, quarterly and annual reports), media clips, and letters. You should identify these sources, compare the information you can obtain from these sources against your indicators, and decide how to use this information.

Also check the tools from previous research or evaluation activities of your organization (e.g., evaluation forms, survey questionnaire) that can be easily modified and used for this evaluation.

Table 3: Monitoring Tool: Activity Tracking Log

Organization	The Boys and Girls Club of Niagara*
Title of project	Youth Volunteer Experience: Enhancing the Mandatory 40 Volunteer Hours for Secondary School Students (funded by the Community Support Centre, CVI)
Type of activity	Training and mentoring workshops
Number of events	Three workshops
Date(s)	
Start	September 2003
Finish	December 2003
Location(s)	Local high schools in Niagara Region 1. (name of high school) 2. (name of high school) 3. (name of high school)
Participants	36 high school students
Segment of the target population	Senior high school students who need to complete their mandatory 40 volunteer hours.
Age range	16-19 years old
Gender	12 males, 24 females
Other specifications (e.g., education, social/economic status, ethnicity)	Students were from five ethno-linguistic groups
Outputs	1. Posted flyers, announcements 2. PowerPoint presentations 3. Workshop planning material 4. Workshop game opportunities 5. Completed evaluation forms
Resources used (for preparation and conduction)	Principals and guidance counsellors at five local high schools Facilitator trained for workshops Workshop print materials School facilities and equipments
Staff	Three staff as workshop organizers and facilitators
Time	12 days
Budget	$4,200
Amendments	• Dates for holding workshops were adjusted due to holidays, exams, and school course loads. • Additional workshop was offered to the youth to make them aware of potential volunteer organizations.
Comments	1. The workshops were beneficial for the youth as they learned about each other and themselves. 2. The workshops challenged the youth to think beyond our project concerning volunteering. 3. The staff facilitators discovered their learning styles and personalities. This was beneficial for the process of mentoring the youth to determine a suitable project.

*The information was adapted from a project funded by the Community Support Centre, 2003-2004.

Developing Evaluation Tools

As part of your evaluation plan, you completed the *Evaluation Tools Matrix* (Appendix 1), which shows the tools you need to gather evaluation information and the tools that must be developed. You should review this matrix and ensure that it is still necessary, practical, and affordable to develop these tools. Also, compare the required tools with the information in Table 1, which describes and specifies evaluation tools as formal or informal.

How to develop evaluation tools ◄

1. There are many techniques and details involved in developing research and evaluation tools. If you are not comfortable with developing such a tool, try to get help from someone (e.g., a volunteer, university student) who has some experience in this field. Also, consult the reference list of this guide for those that are related to research methods.

2. Appendix 5 presents tip sheets on how to develop and use four common evaluation tools: focus groups, questionnaires, interviews, and survey methods. Use them if you are developing one of these tools.

How to check the newly developed evaluation tools ◄

Once the tools are developed by internal or external resources, you need to

1. identify how you will analyze the data that you collect using these new tools and estimate the skills and time you will need to complete data analysis (see Module Three for more information);
2. check the content of the tools and make sure it targets the information you need;
3. check the structure and language used in the tools and make sure they are clear and simple;
4. check the instructions for the tools and make sure they are complete;
5. find someone in your organization (e.g., staff or volunteers) who could review your newly developed tools and provide some feedback; and
6. test your newly developed tools with a small number of people before using them.

Managing Data Collection

Tool development and data collection are the two parts of your evaluation that consume most of your evaluation resources (i.e., time and budget). There are two points you should consider when collecting data:

How to make the data collection more manageable ◄

You may need to run a selective data collection, which means focusing on the project priorities identified by the key stakeholders. Also, it should be focused on relatively simple and economical activities. Grove, Kibel, and Haas (2005) suggest using the matrix below to decide on the data that should be collected. If you can obtain information easily by using a simple existing tool, and if the information has a high priority for your stakeholders, then the information must be collected (upper left of matrix). However, if information does not have a clear and accessible source or a simple inexpensive tool and it has a low priority, then the benefits of that information should be reconsidered, or the collected data could be totally ignored (lower right of matrix).

Table 4: Priority Ranking for Data Collection

		Data Collection Challenge		
		Easy	**Feasible**	**Difficult**
Stakeholder Priority	**High**	3 Definitely Collect	2 Worth Collecting	2 Consider an Alternative
	Medium	2 Worth Collecting	1 Collect if Have Time	1 Collect if Have Time
	Low	1 Collect if Have Time	1 Collect if Have Time	0 Ignore

Source: Grove, J.T., Kibel, B.M., Haas, T., 2005. EvaluLead: A Guide for Shaping and Evaluating Leadership Development Programs, p.20. The Public Health Institute, Oakland, California.

Other things to consider when collecting data are to

- Have a mechanism in place to keep track of data collection activities and to organize data as soon as possible.
- Perform an initial estimate of time and skills required for analyzing and interpreting data to be better prepared for working on data. This will be explained in Module Three.

How to make the data collection more accurate ◄

If you have people to help you gather data, you need to provide them with adequate information and instructions for doing their part. Prepare an information sheet on how to use the newly developed tools, and attach it to a summary of the evaluation plan and objectives. Communicate with them regularly and make sure they are clear about the process.

If you have more than one assistant using the same tool for gathering data (e.g., different facilitators for focus groups), make sure they are consistent in using it to collect information.

If you collected data on tapes (e.g., recording phone interviews) and need to transcribe the information, provide the transcribers with details on how to do the task (e.g., transcribing word by word and not summarizing conversations).

COMPLETING THIS MODULE

In this module, you learned about

- engaging an evaluation group;
- assembling skilled staff;
- increasing organizational support;
- understanding ethical conduct for evaluations;
- using your evaluation plan;
- identifying evaluation indicators;
- monitoring your project activities;
- finding existing evaluation tools;
- developing evaluation tools; and
- managing data collection.

Now you are ready to use both the existing and newly developed tools and mechanisms to gather evaluation data for analysis. Revisit this module or references related to research methods if you have any questions or face any challenges, and be ready to make modifications if the collected data are not what you expected.

MODULE 3

Analyzing and Interpreting Data

Data can't speak alone; to give them voice, you have to first analyze them and then interpret the results. In the previous modules, you collected data that are only facts and figures with the potential to direct you to conclusions. In this module, you will learn how to analyze your data and transform them into conclusions, answers to your evaluation questions, and actionable suggestions.

Explaining all of the required knowledge and skills for analyzing and interpreting any type of data would be very broad and beyond the scope of this guide. For more information on data analysis, look at the Reference list of this guide and find those that are related to social research methods, particularly those that focus on the type of data you are collecting (e.g., references for quantitative data analyses).

Data analysis will be straightforward if you start planning for it when you are developing tools for gathering (i.e., as part of Module Two). For example, you should know the analytical methods you require and have an estimate of the analytical skills and the time you need to complete the steps explained in this module. Also, check the data collection priority-ranking table in Module Two and start with the high-priority data that are the easiest to analyze.

Understanding Types of Data

When gathering data, it helps to have an understanding of the types of data you may find. Depending on your evaluation tools, you may gather **quantitative** or **qualitative** data.

Quantitative Data

Quantitative data describe a situation by using numbers. These data could be the actual numbers; for example, the number of events your organization held, the number of services you provided, the number of materials you produced. Also, the quantitative data could be some numbers that represent the relationships among concepts; for example, the numbers that express the rates (e.g., in a six-point scale) or ranks of opinions, feelings, skills, and knowledge. You may collect this type of data when you use a survey questionnaire, an evaluation form, a test (e.g., knowledge test), or some outputs of your project.

Once you complete your analysis, the most common quantitative findings you look at and use for interpretations could be total numbers, percentages, frequencies, averages, ratios, ranks, and orders.

Qualitative Data

Qualitative data take the form of words, texts, ideas, and stories that explain a situation. You typically collect this data when project participants describe a situation in their own words, whether you use formal or informal conversations, interviews, or focus groups. You can also use project-related documents such as notes about direct observations, minutes of meetings, and journal entries (see Table 1 for descriptions of these and for more examples).

You may present the results of qualitative analyses in several forms such as categories of themes, patterns and concepts, lists of commonalities and differences, definitions of approaches and attitudes, and anecdotes that support other results.

Although you analyze these two types of data separately by using different skills, techniques, or software, the results of your analyses can be combined when you interpret the results and make conclusions. For example, to evaluate a literacy program (i.e., an outcome evaluation), you can collect quantitative data about the participants' abilities by rating, ranking, and timing their reading skills at the beginning, during, and at the end of the program. You can also collect qualitative data by taking notes of participants' reading behaviours through occasional observations and interviewing them about their skills and perception of the process at the end of the program. These two sets of data should be analyzed separately, using different techniques. Then, you can combine the results of your analyses to show how the program helped increase the participants' literacy skills and improved their reading behaviours.

Preparing Data for Analysis

Before analyzing your data, you need to categorize, code, and organize them into manageable files and folders, either electronically or on paper. It may be helpful if you check the Reference list for those related to data entry and data management (e.g., see Patton, 2002, pp 462-466, for qualitative data).

How to prepare data files for analysis ◄

The following are some tips for preparing your data files:

1. Create a data file for each evaluation tool you use. For example, create one file for survey data and another file for data from interviews.
2. Transcribe any tape-recorded data. Tell transcribers that you need to see the exact vocabulary used by the respondents, so they shouldn't interpret or summarize what they hear.
3. Consider using data analysis software. For quantitative data analysis, you may want to use Microsoft Excel or the Statistical Package for the Social Sciences (SPSS). If you have a lot of qualitative data, you may want to use some kind of Computer Assisted Qualitative Data Analysis Software[13] (CAQDAS), such as NVivo and XSight. To learn more about qualitative software, check out www.qsrinternational.com and the virtual library of sociology software at McMaster University – socserv2.mcmaster.ca/w3virtsoclib/software.htm.
4. Enter the data into the analysis software. If you are uncomfortable with data entry, try to get help from someone with experience in this field, such as a volunteer or university student.
5. Categorize and code your data to help you see them in a more meaningful way. There are different strategies you can use for categorizing and coding. The simple way is to use the same categories you used for your evaluation tool. For example, if you added a question to your survey asking how satisfied the participants are with the facilitator or trainer, you should have some categories and codes to represent satisfaction.
6. Check the prepared data files, review the data-entry process, and make sure all your data have been entered.
7. Identify any missing data, such as unanswered questions. Missing data should be coded differently and be tracked as part of your analysis.
8. Create backups for your data files and keep them in a safe place.

[13] See Barry, C. A. for a discussion on pros and cons of using software for qualitative data analysis.

Checking Data Accuracy

Once you have your data files, you should double-check them for accuracy before starting your analysis. As you learned in Module Two, the first step in getting accurate data is to provide your data collectors with appropriate information and instructions. Then, once the data is collected and categorized, you can do a final check for accuracy. The following are some techniques for checking quantitative and qualitative data.

How to check the accuracy of quantitative data ◄

1. Look for numbers that are invalid for a category. For example, 124 can't be an acceptable number for age or years of education.

2. Make sure the category subtotals are consistent with the total number of responses. For example, if you received 535 responses to your survey and the results show 140 respondents were under 21 years old, 360 were 21 or over, and 45 did not answer the age question, the total of these subgroups (545) is inconsistent with the total number of respondents. This means there are 10 incorrect responses that you need to check.

3. If respondents had to skip some questions (see Exhibit 6 for an example), make sure that they did it correctly and did not answer questions that didn't apply to them. For example, if a question is for married respondents only, make sure that the responses of those who answered *not married* to the marital status question will be excluded from the analysis.

4. If respondents selected more than one option when they had to choose only one, make sure these responses will be excluded from the analysis. Disregard any other unclear, ambiguous, and irrational responses as well.

5. Randomly select some respondents (e.g., 7%) and re-enter their responses in a separate file. Make sure the results are the same as those that were entered for these respondents in the original data file. If you find a lot of mistakes in the original data file, you may need to re-enter all of the data. Use your judgement or consult with your evaluation group to decide the number of mistakes that can disqualify your data.

How to check the accuracy of qualitative data ◄

1. Make sure your facilitators and interviewers followed the instructions accurately.
2. Make sure all data are entered.
3. Look at the interview questions and make sure they were not directional or leading. For example, did they say, “What do you mean by that?,” and, “That sounds interesting, can you tell me more about it?,” or did they say, “Do you really believe in it?,” and, “Can you give me a better answer?”
4. For transcribed data, randomly select one or two sessions and listen to the tapes. Make sure the transcriptions are consistent with the recordings. If the interviewers took notes, compare them to the transcriptions.

Exhibit 6: Example of Skip Pattern Questions in Surveys

Changing the Culture to Create Future Leaders

In 2005-2006, the Canadian Red Cross Newfoundland and Labrador Region received funding for a one-year project on how to change our culture to create future leaders. It conducted a survey to understand what youth need to become strong leaders, which was sent to 2,000 youth ages 14 to 17. In total, 1,200 completed surveys were returned – a 60% response rate. The following (p.38) is taken from the first section of this survey:

"Changing the Culture to Create Future Leaders"
Youth Leadership Questionnaire
May 2005

Tell us about YOU...

How old are you? _____
What is your gender? _____
What community are you from? _____
What is the name of your school? _____
What grade are you in? _____

Tell us about your leadership experience...

This section is about your experience in formal leadership roles you may have been or may be involved in. Some examples of roles you may have had are team captain, coach, guide/scout leader, school council, church group leaders, cadet officers, music/dance teacher, etc.

Please **CIRCLE** your answer and fill in the blanks:

1. Do you have any leadership experience? Yes No → Go to question 10
2. Do you see yourself as a leader? Yes No
3. Do other people see you as a leader? Yes No
4. Are you a leader in your school? Yes No → Go to question 6

5. Please describe the leadership roles you have at school:
a. _____
b. _____

6. Are you a leader in your community? (anything outside of school)
Yes No → Go to question 8

7. Please describe the leadership roles you have in your community:
a. _____
b. _____

8. What do you feel would attract more people to become leaders in your school or community?
a. _____
b. _____

9. As you are currently in a leadership role, what could be the three things that you need to become a better leader or take on more responsibility as a leader?
1. _____
2. _____
3. _____

10. If you are not a leader now, do you want to become a leader? Yes No

Analyzing Data

Once the data files are ready, you can start your analysis. You can either do it by hand or use statistical software depending on: the number of data, the evaluation questions that need to be addressed, the types of analyses required, and your familiarity with existing analysis software. Again, if you are not comfortable with statistics and data analysis, try to get help from someone who has a research background and experience in working with data. Although the following are some basic steps for data analysis, these are not complete if not accompanied by research expertise.

How to analyze quantitative data ◄

1. Review the project map of your evaluation plan from Module One, particularly the evaluation questions (both process- and outcome-oriented) that you can answer with your current data. Highlight the question(s).

2. Review and highlight the indicators from Module Two, particularly the quantitative indicators that you can measure or define with your current data.

3. Run basic (descriptive) statistical analyses including *frequencies*, percentages, and averages on the data categories.

4. If you think that the data require further analysis (e.g., Descriptive Statistics *Crosstabs, Correlation Coefficient, Regression*), find help from someone who has experience in statistical analysis.

5. Decide, with input from your evaluation group, if you should include missing data in your analysis. Although they are usually excluded, you should report their percentages. If the number of missing data for an item is relatively high, you should either not use the results or be cautious about the validity of the results when interpreting them. In any case, consult with your evaluation group. A rule of thumb for excluding data is when approximately 10% of the responses are missing.

6. Review each item/category and create a pattern for your analysis based on the relationships among categories (i.e., variables) and how important they are in answering the evaluation questions or measuring the indicators. For example, if you need to know how gender may affect responses to a training program with regard to knowledge test scores or level of satisfaction, you should run an additional statistical analysis such as Descriptive Statistics Crosstabs to describe the relations among these variables.

7. Compile the results of your analyses and arrange them in a way that relate them to both the evaluation questions and indicators that you have highlighted for this set of analyses.

8. Review the project outputs and identify those that may support or oppose the results.

9. Write down the results of your analyses and make sure the statements are logically sound.

How to analyze qualitative data

You can conduct qualitative analysis through various processes depending on the method of collecting data. For example, analyzing field observation notes can be different from analyzing data from interviews and case studies. Consider your method of data collection when applying the following steps:

1. Review the project map of your evaluation plan from Module One, particularly the evaluation questions (both process- and outcome-oriented) that can be answered by the data you are analyzing now. Highlight the question(s).

2. Review and highlight the indicators from Module Two, particularly the qualitative indicators that you can measure or define with your current data.

3. Read all collected data related to the highlighted questions and indicators at once.

4. Classify the collected data based on their themes. For example, search for common verbs (e.g., action verbs, affective verbs) and organize answers around them. You may need to re-organize or re-code your data.

5. Find similarities among responses across participants (e.g., positive feelings toward a situation). Check whether the identified similarities can address your highlighted evaluation questions and indicators, and document them.

6. Identify the level of occurrence for each similarity: high (mentioned by many respondents), medium (mentioned by some respondents), or low (mentioned by few respondents). Reporting a precise number/percentage is not necessary because in qualitative analyses the intensity, nobility, and uniqueness of points and ideas are the main focus.

7. Just as you did for similarities, find differences among responses across participants, such as positive versus negative feelings toward a situation. Check whether the identified differences can address the highlighted evaluation questions and indicators, and document them.

8. Identify the level of occurrence for each difference as high, medium, or low. Again, reporting a precise number/percentage is not necessary.

9. Search for responses, incidents, or stories that are odd and distinguished in any way or introduce a new perspective.

10. Prepare the results of your analysis by explaining evaluation questions and indicators on one side and the themes and categories, general and particular patterns of responses, similarities and differences, and distinguished or innovative perspectives on the other side.

11. Review the project outputs and identify those that may support or oppose the results.

12. Write down the results of your analyses and make sure the statements are logically sound.

Interpreting Results

Interpreting results is a process of linking the facts or points identified through your data analyses to the purposes and values that drove your evaluation. Through this process, the information turns into evidence that can demonstrate the progress, success, and achievements of your project. This process should also result in project learnings, improvements, and suggestions for making decisions or planning in the future.

So far, you have the results of qualitative and quantitative data analysis. You also may have some information collected through other ways such as documentation. To interpret the results, you need to put these separate pieces of information together in a way that explains the success, failure, achievements, modifications, and movements of the project toward its objectives. You should also be aware of both confirmatory, or positive, and contradictory, or negative, findings, as well as expected and unexpected ones.

How to interpret the results ◄

The following are some tips for interpreting your evaluation results:

1. Review each section of results and ask yourself, “So what?”
2. Address each project objective and evaluation question by using both qualitative and quantitative results as well as other information you may have obtained during the project.
3. If the results are positive and confirm project achievements, explain how they support the project objectives and their success.
4. If the results are negative and contradict a planned achievement, explain how they fail to meet the project expectations and what should have been done differently.
5. Think about other questions that can be answered with the results.
6. Use these results to draw overall conclusions on the impacts that the project has had on its internal and external stakeholders.
7. Provide suggestions for
   a. the future of the project;
   b. modifications that may be required;
   c. how to increase the success or effectiveness of the project;
   d. how to decrease the weaknesses or potential risks of the project; and
   e. how to use the results of this evaluation.
8. Take a break for a couple of days and then review your results and interpretations again.
9. Make sure there is enough information about the original needs and purpose of the evaluation.
10. Discuss the results with the evaluation group and complete/revise your interpretation and suggestions accordingly.
11. Present a summary of results to the other project stakeholders. Complete/revise your interpretation accordingly.

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COMPLETING THIS MODULE

In this Module you learned about

- understanding quantitative and qualitative data;
- preparing data for analysis;
- checking the accuracy of data;
- analyzing data; and
- interpreting the results of your analyses.

Now you should have all the findings for your evaluation work. Share the findings with your evaluation group and ensure that the findings are clear and relevant and you have done enough data analyses. Be prepared to repeat part of your analysis for checking or to run new analyses to enrich your findings.

MODULE 4

Communicating Evaluation Results

Charitable and nonprofit organizations should communicate the results of their project evaluations to their external and internal stakeholders. The 2004 Muttart Foundation study shows that Canadians think that they do not receive enough information about how charities work or how they are monitored. Communicating your evaluation results can meet this external audience's expectations by demonstrating the value of your organization's programs and services, presenting your organization's credibility and transparency to Canadians, and increasing the public trust you enjoy.

Communicating evaluation results internally is also crucial as it can assist your organization in making decisions on the future of the current project, attract funding for other projects, and facilitate strategic planning. Without communicating the results, evaluation is a waste of your organization's resources.

How to use evaluation results ◄

You can use the results of a project evaluation to

- identify ways to improve or shift your project activities;
- facilitate changes in the project plan;
- prepare project reports (e.g., mid-term reports, final reports);
- inform internal and external stakeholders about the project;
- plan for the sustainability of the project;
- learn more about the environment in which the project is being or has been carried out;
- learn more about the target population of the project;
- present the worth and value of the project to stakeholders and the public;
- plan for other projects;
- compare projects to plan for their futures;
- make evidence-based organizational decisions;
- demonstrate your organization's ability in performing evaluations when searching for funds; and
- demonstrate your organization's concerns to be accountable for implementing its plans, pursuing its goals, and measuring its outcomes.

You should explore various paths to communicate the results of the project evaluation and search for opportunities where you can present all or part of these results. The following are some common ways to communicate the results of your project evaluation.

Preparing Reports

Producing a report is one way to communicate the results with your stakeholders such as project funders, decision makers, planners, project managers, or those who act or modify their actions based on the evaluation results. The report should include those aspects of the project and its evaluation that are, based on your knowledge, important to the readers. The report should also encourage them to use the information and recommendations.

Appendix 6 contains a template to help you transform the project evaluation plan you prepared in Module One into a project evaluation report. This report format originally targets the project funder(s). To complete this template, you need to use your evaluation plan and compare the planned activities, outputs, outcomes, and other components of your plan with the actual ones that have been occurred as well as your evaluation findings.

The following are some tips to prepare an evaluation report for various audiences.

How to prepare an evaluation report

1. Identify the potential readers of the report. They may be some of the stakeholders you identified in your evaluation plan.
2. Choose clear understandable language geared toward the report's primary audience.
3. Based on this audience, prioritize the evaluation questions that you want to answer in this report.
4. Structure the materials in a way that leads readers from the key findings to the details of the project.
5. Gather enough information to explain details such as budgeting and planning. If you know that your readers may want to duplicate your evaluation, you need to add such details to the report. These details should be mainly descriptive.
    - If preparing a formative or process evaluation report, provide enough details about the operational aspects of the project (i.e., what was done and how).
    - If preparing a summative or outcome evaluation report, provide enough details about how you interpreted the results and drew conclusions.
6. Use graphs, charts, tables, diagrams, and other visual techniques to display the key results as simply as possible.
7. Always prepare an executive summary (see below) if the report is longer than 15 pages.

What are the contents of an evaluation report?

Your report may include the following sections:

- **Executive Summary:** Include a short summary of the evaluation process and a complete summary of results, objectives achieved, lessons learned, questions answered, and needs fulfilled. It should be not more than two pages long.
- **Introduction:** Present the background and activities of the project and the purpose of the evaluation.
- **Evaluation Methods and Tools:** Explain the evaluation plan, approach, and tools used to gather information. Provide some supporting materials such as a copy of the evaluation plan and the tools that were developed.
- **Summary of Results:** Present results of the qualitative and quantitative data analysis as explained in Module Three.
- **Interpretation of Results:** Explain the interpretation of results including impacts on participants and staff, effectiveness of services, sustainability of project activities, strengths and weaknesses of the project, and lessons learned (see Module Three).
- **Connection to the Project Objectives:** Highlight the value and achievements of the project and the needs or gaps that the project addressed.
- **Conclusions:** Describe, overall, (a) how your project objectives were met, (b) how the purpose of the evaluation was accomplished, and (c) how the project evaluation was completed.
- **Recommendations:** Summarize the key points, make suggestions for the project's future and create an action plan for moving forward. You may present recommendations in the following parts:
    - Refer to the usefulness of the results for your organization, or for others, in areas such as decision-making, planning, and project management.
    - Refer to the project limitations, the assistance required, and resources that can make future project evaluations more credible and efficient.
    - Describe the changes you would make to your project if you were to carry it out again and the suggestions you have for other organizations that may want to conduct a similar project.

Presenting Results in Person

Presenting evaluation results to some project stakeholders in a face-to-face two-way method gives your audience an opportunity to ask questions. It also provides you an opportunity to directly communicate with your audience and receive direct feedback not only on the project evaluation and its report but on the other needs, expectations, and concerns that they may have.

How to prepare a presentation on evaluation results ◄

1. Identify the audience and their needs, interests, and expectations as much as possible.
2. Choose clear understandable language geared toward your audience.
3. Based on the audience, prioritize the evaluation questions that you want to discuss in your presentation.
4. Summarize the evaluation purpose, the project description, the evaluation plan, process, findings, and conclusion.
5. Focus on the parts of your evaluation that stimulate questions and discussions about the findings, conclusions, and particularly the usability of the results.
6. Avoid using jargon and acronyms that are commonly used only within your organization.
7. Provide your audience with a copy of any visual aids so that they can brief other members of their groups.
8. Complete the presentation by summarizing the steps for using this project evaluation and the necessary assistance and resources that will make future project evaluations more credible and efficient.
9. Provide enough time to answer questions. Also, think of some questions that you can ask the audience about the work.
10. Give the audience some time to think about your presentation and provide feedback.
11. Listen carefully to the questions, topics of discussions, and suggestions, and take note of them.

Using the Media to Communicate Results

Using the media is another way to communicate all or part of the results to external stakeholders. By getting your results published, you can increase the visibility of your organization and contribute positively to the way its work is perceived by the public. Target the audience who may be most interested in, and find potential benefits from, the results. The following are some tips for using the media:

1. Prepare a media package that tells the story of the values, results, and impacts of the work and is appropriate for your organization's newsletters, website, and news releases as well as local newspapers, other organizations' websites, etc.
2. Select the results that would suit a larger audience.
3. Write the materials in an informative, easy-to-read, and ready-to-use style.
4. Avoid using technical terms. If necessary, provide simple definitions.
5. Avoid using jargon and acronyms that are commonly used only within your organization.
6. Include some clear actionable statements for each section of the media package.
7. List the key messages that you want to get across about the project and its evaluation.
8. Prepare an information sheet that presents the key messages.
9. Make the media package or the information sheet newsworthy by either relating the results to current events or other crucial topics in the charitable and nonprofit sector, or by telling a story that complements the results.

COMPLETING THIS MODULE

In this Module you learned about

- using the evaluation results;
- preparing an evaluation report;
- presenting the results in person;
- using media to communicate the evaluation results.

Now you should have some communication materials (e.g., reports, presentations, media package) to reach out and let the results of your evaluation inform practices and increase understandings of your project and your organization. Although you need to be attentive to how the evaluation results or recommendations may affect other projects or organizational functions if they are put into practice, to complete your work for now, just make sure that various stakeholders of the project are aware of the results and how to use them.

Accountability: Refers to capacity of being accounted for e.g., plans, promises. Being accountable is defined as being answerable and explainable (Merriam-Webster Online Dictionary).

Correlation Coefficient: A number between -1 and 1 that shows the degree to which two factors are linearly related. For example, if one factor increases or decreases and the other does the same, there is a positive correlation coefficient between them, and the highest is 1. If one increases and the other decreases (or vice versa), there is a negative correlation coefficient, and the highest is -1. When the correlation coefficient is 0, it means that there is no relationship between the two factors.

Crosstabs: Measures the strength of association between two categories of factors. It shows how the frequency of occurrence of one factor is related to another.

Data: Facts or figures from which you can draw conclusions.

Evaluand: The object being evaluated. It may be a program, project, personnel, product, policy, proposal, procedure, etc.

Evaluation questions: Key questions that you need to answer to complete a part of the project or achieve an objective. Asking and answering the right questions will lead to a useful project evaluation.

Evaluation tool: An instrument or device that provides data on the quantity or quality of the project being evaluated. It may also be called a *measure*.

Frequency: The number of instances.

Indicator: A signal that reveals progress (or lack thereof) toward objectives; a means of measuring what actually happens against what has been planned in terms of quantity, quality, and timeliness.

Information: Data that have been recorded, classified, organized, related, or interpreted within a framework (e.g., framework of a project) so that a meaning emerges.

Monitoring: A continuing action that provides project managers and other stakeholders information about an ongoing project's progress. It ensures that required activities are taking place and procedures are being implemented as planned.

Outcome evaluation: Assesses the extent to which a program or service affects participants or an environment according to specific factors (i.e., variables). The results of this type of evaluation identify both desirable and undesirable outcomes and whether the needs that gave rise to the program still exist. The evaluation may assess any or a combination of immediate, short-term, or long-term outcomes.

Outcomes: The impacts or changes that can be attributed to the project activities (e.g., changes in participants' knowledge and attitudes, changes in organizational conditions and services). Outcomes are usually gradual and difficult to observe or measure.

Outputs: The direct results or products of project activities, such as the number of services provided, the tools developed, and the number of people served. Outputs are relatively immediate and easy to observe or measure.

Process evaluation: Examines ongoing program operations (i.e., what is done and how) and whether the targeted population is being served. The results of this type of evaluation can identify how a program operates and the changes that can improve it.

Project: A set of planned, interrelated activities aimed at achieving specific goals within a specific time frame.

Regression: Helps us understand and predict the relationship between two or more factors. The results of a regression equation or regression line can indicate the extent to which you can predict the changes of a factor by knowing other factors or the extent to which one factor is associated with other factors.

Stakeholders: The individuals or organizations that have an interest in a project or program. They include individuals and organizations that make decisions, participate in the project, or may be affected by the project activities.

Statistics: Are a method of presenting information.

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APPENDIX 1: TEMPLATE FOR EVALUATION TOOLS (MATRIX)

Evaluation Question	Evaluation Tools												
	Survey (Mail/ Telephone)	Interview	Knowledge Tests	Focus Groups	Evaluation Forms	Journal Recording	Onsite Visits	Activity Log	Observation and Notes	Documentation	Anecdotal Records	Is the tool available? Yes/No

APPENDIX 2: TEMPLATE FOR EVALUATION BUDGET

Activity	Position in Charge	Number of Days	Cost per Day	Total Cost
Evaluation Management and Direction			$	$
Evaluation Planning				
			$	
			$	
			$	
			$	
				Subtotal $
Evaluation Implementation (Develop tools and gather data)				
			$	
			$	
			$	
			$	
			$	
			$	
			$	
				Subtotal $
Information Analyses				
			$	
			$	
			$	
			$	
			$	
			$	
				Subtotal $
Communication (prepare materials and communicate)				
			$	
			$	
			$	
			$	
				Subtotal $
Travel and Meetings				
			$	
			$	
				Subtotal $
Operating Expenses				
				Subtotal $
				Total $

APPENDIX 3: TEMPLATE FOR EVALUATION PLAN

Evaluation Plan Template

A complete evaluation plan template is a management tool that you can use to monitor project activities, demonstrate progress, make decisions about changes, and prepare reports.

Project Goal

A goal is a general statement about what you are trying to accomplish. A project goal can give direction to your project activities and help your team keep focused.

For example, the goals of the Canada Volunteerism Initiative (CVI) are to

- encourage Canadians to volunteer with organizations;
- improve the capacity of organizations to involve volunteers; and
- enhance the experience of volunteering.

What are the goals of your project?

1.

2.

Project Objectives

Objectives are specific, measurable statements of the desired change(s) or progress that a project intends to accomplish by a given time.

For example, an objective of CVI is

- to establish three national centres and 13 local networks that deliver a range of programs on volunteerism over five years.

What are the objectives that you want to achieve within the time frame of your project?

1.
2.
3.
4.

Project Stakeholders

Stakeholders are the individuals or organizations that have a vested interest in your project. They include individuals and organizations that make decisions, participate in the project, or may be affected by project activities.

For example, Volunteer Canada and Imagine Canada are among the CVI stakeholders, as are other Canadian charitable and nonprofit organizations that will be affected by CVI activities.

Who are your project stakeholders?

A: Specify the stakeholders who should participate in this evaluation:

B: Specify the stakeholders who need information from this evaluation and will see the results:

Project Outcomes

Outcomes are changes or effects that participants or other stakeholders of your project experience as a result of their involvement. Because the outcomes of your project may appear gradually, it is often helpful to divide them into three stages: immediate (short-term) outcomes, intermediate outcomes, and ultimate (long-term) outcomes.

For example, for the Canada Volunteerism Initiative (CVI)

- An immediate outcome is: increased information on volunteerism.
- An intermediate outcome is: improved understanding of volunteerism.
- An ultimate outcome is: increased volunteering in Canada.

The outcomes of your project may include

- Specific skills and knowledge that project participants will gain.
- Changed attitudes or values about specific issues among some project participants or in your own organization.
- Improvement in specific organizational conditions, either in your organization or others.
- Modified specific behaviours in some project participants.

1. What outcomes do you expect to achieve during or right after the completion of your project (i.e., your immediate or short-term outcomes)?

2. What outcomes do you expect to achieve within three to six months after the completion of your project that you could still attribute to the activities of the project (i.e., your intermediate outcomes)?

Project Map

The first three columns of this table present the logical relations among components of your project. The last three columns present evaluation components. It shows, in one glance, what you need to do to complete this project and meet its objectives. Update this map as the project progresses. **Complete one table for each objective.**

Objective 1	Project Activities Relating to the Objective	Anticipated Outputs (direct products of related activities)	Evaluatoin Questions Relating to the Objective and Activities	Evaluation Tools (How you will gather evaluation information)	Source of data (From whom you will gather the information)

Monitoring Tool: Activity Tracking Log

Type of Activity	
Number of events	
Date(s)	
Start	
Finish	
Location(s)	
Participants	
Segment of the target population	
Age range	
Gender	
Other specifications (e.g., education, socio-economic status, ethnicity)	
Outputs	
Resources used (for preparation and conduction)	
Staff	
Time	
Budget	
Amendments	
Comments	

Monitoring Tool: Contact Tracking Log for Program Inquiries

(A) Record of Contacts for Inquiries						
Name	Position	Organization Name	Organization Address	Organization Type	Date of Contact	Type of Inquiry

(B) Record of Responses to Inquiries					
Staff Name	Position	Response Date	Response Format	Response Content (Summary)	Satisfaction with Response

Understanding 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. Typically, focus groups involve six to 12 participants who are asked to respond to a series of questions posed by a moderator. The focus group participants should be members of your target population. A focus group session usually lasts about two hours. Conducting more than one focus group on your topic of interest will give you better confidence in results.

What is the purpose of a focus group?

With a focus group, you can use the discussions to obtain information that may be otherwise difficult to get. The free exchange of thoughts and opinions makes the focus group a unique way of exploring ideas and getting feedback on your topic.

When is a focus group an appropriate research method?

Focus groups are well suited to sharing ideas, deepening discussions, and obtaining feedback about complex issues. Use them to learn about issues, opportunities, and problems. Focus groups are not appropriate for comparing ideas or obtaining people's opinions on sensitive topics. It is also important to remember that focus groups include only a few members of your target population and do not necessarily represent the opinions of the entire population.

How do you select focus group participants?

Focus group participants should be members of your target population (e.g., if you are interested in opinions about volunteering among immigrants, your group should include immigrants to Canada). The members of a focus group should also share some other characteristics. Decide on the characteristics that your participants should have in common – such asage, gender, ethno-cultural background, occupation, level of education, and socio-economic status – in order to interact freely and provide useful information.

How to carry out a focus group ◄

Before the session:

1. **Define your objectives.** Identify what you want to achieve and make sure a focus group is the appropriate way to meet your objectives.
2. **Choose a moderator.** Be sure your moderator is skilled in facilitating discussion; he/she should be a good listener who understands the intent of the study and can give all participants a chance to voice their opinions and prevent any participants from dominating discussion and influencing the opinions of others.
3. **Prepare six to 12 questions that generate continuous conversation.** Arrange the questions into a sequence that is appropriate to your objectives, and prepare some follow-up questions that will prompt respondents to elaborate on their answers.
4. **Test the questions before finalizing them.** They should provide enough information without inspiring tedious discussions. You can test your questions with your colleagues, the project advisory committee, or other project stakeholders.
5. **Recruit participants.** Carefully consider their backgrounds and experiences, and establish qualification criteria for selecting participants.
6. **Offer incentives** to participants such as refreshments, childcare, and/or monetary compensation.
7. **Have participants sign consent forms.** Participants must be fully informed about the purpose of your focus group and what you will do with the information they provide. Written consent should be obtained whenever possible.
8. **Find an appropriate space** such as a conference room or private office.
9. **Develop a discussion guide** that includes an outline of discussion topics and questions. Make sure it is easy for the moderator to follow and indicate how much time should be spent on each topic area.
10. **Set up recording equipment.** Focus groups are usually videotaped or audio taped. Ask for participants' permission ahead of time.
11. **Assign a note taker.** Have someone on your research team take notes to support the video/audio recordings. If taking notes is the only way of recording sessions, make sure the note taker is prepared to take thorough notes.

During the session:

1. **Explain the purpose.** Why are you conducting this focus group?
2. **Explain how you will record the discussion and use the results.** Who will see or hear the conversation?
3. **Use an exercise to warm-up the group.** Pass out nametags and play a name game.
4. **Move from general to specific topics.** Begin with the most general questions to get people talking and then move on to more detailed questions.
5. **Be creative.** Small exercises will help maintain interest and engagement.
6. **Finish the session** by reviewing the key ideas and ask for confirmation or additional thoughts.

After the session:

1. **Summarize your data.** Reserve time between sessions to summarize what you learned.
2. **Transcribe your data.** Type out all dialogue. If possible, have an experienced transcriber do it for you.
3. **Be prepared to analyze your data.** Learn about qualitative data analysis (e.g., coding, categorizing, comparing, and contrasting responses). See below for resources on qualitative analysis.
4. **Be careful in generalizing your findings for a larger population.** Because your findings are based on a small group, they are more suitable for exploring new research questions or topics, or explaining or confirming previous findings.
5. **Prepare a report.** Address the focus group guide questions and use quotes for illustration. Have a section for conclusions and suggest next steps.

Checklist for Planning a Focus Group:

- ❑ Have you established clear objectives for conducting your focus group?
- ❑ Have you chosen a skilled moderator?
- ❑ Have you decided how you will select your focus group participants?
- ❑ Have you prepared focus group questions and a discussion guide?
- ❑ Have you arranged for recording equipment?
- ❑ Are you prepared to analyze qualitative data and discuss the results?
- ❑ Have you included quotes, conclusions, and suggestions in the report?

For More Information

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Designing a Questionnaire

What is a Questionnaire?

A questionnaire is a tool for gathering information from individuals or organizations. Questionnaires can be used to measure opinions, attitudes, behaviours, and perceptions on specific topics. They can also be used to collect demographic and background information. A well-designed questionnaire is essential for successful survey research. See our *Understanding Survey Research Methods* Tip Sheet for more information on survey research.

What is a Questionnaire Item?

Each question or statement that appears in a questionnaire is called an *item*. Consider the wording and position of each item carefully, because it can influence the answers you receive.

Item Format

Questionnaire items can be either open-ended or closed-ended. A questionnaire usually includes both types of items so that participants can express their views in different ways.

Open-ended items ask respondents to answer in their own words (e.g., Why do you volunteer?). The information gathered from open-ended items requires qualitative analysis such as categorizing, coding, and searching for patterns and themes. Some qualitative data can be coded and analyzed like quantitative data.

Closed-ended items ask respondents to select an answer from a list (e.g., Which of the following is the main reason you volunteer?). They provide quantitative data that can be analyzed using a software program such as Excel or SPSS. The answers to close-ended items can take many different formats such as:.

Examples of Closed-Ended Questions
Yes/no responses:
Have you ever volunteered? ❑ Yes ❑ No
List of possible responses:
How did you become involved in volunteering (select all that apply)? ❑ I was asked by someone in the organization ❑ I was asked by a friend or relative outside the organization ❑ I approached the organization myself ❑ I am a member of the organization ❑ My child or spouse is involved ❑ Other, please specify: _____
List of possible categories:
How many people volunteered for your organization over the past 12 months? ❑ None ❑ 1 to 24 ❑ 25 to 74 ❑ 75 to 199 ❑ 200 or more
Measurement Scale:
My organization supports the involvement of volunteers. ❑ Strongly agree ❑ Somewhat agree ❑ Agree ❑ Somewhat disagree ❑ Strongly disagree

Item Wording and Order

Questionnaire items should:

- be easy to read and understand;
- explore one piece of information only;
- be related to the topic of the questionnaire;
- ask for information that respondents can provide with some degree of accuracy; and
- be free from bias and not lead respondents to any particular answer (e.g., identifying a powerful person's ideas or referring to a prestigious agency can bias responses).

Questionnaires should be organized so that the items are arranged in a logical sequence, and the first few items are interesting, easy to answer, and not particularly personal or sensitive.

How to design a questionnaire ◄

Step One – Research Questionnaire Items

1. Identify the topics you want to research.
2. Find out if others have studied these topics using questionnaires and the type of questions they used.

Step Two – Determine the Format of Questions

1. Identify closed-ended items and develop response options or measurement scales for them.
2. Identify items that should be in an open-ended format and decide how you will analyze the responses.
3. Arrange the items following the tips above.

Step Three – Test and Finalize the Questionnaire

1. Administer the questionnaire to a small group of people and ensure that:
   a) it does not take longer than 30 minutes to complete;
   b) respondents understand all items;
   c) all items are free of bias; and
   d) your measurement scales are appropriate and provide sufficient data for analysis.
2. Create a mock data set based on your questionnaire and analyze it to ensure that you can perform the analyses you require.
3. Revise the wording, order of items, and length of the questionnaire as necessary.

Checklist for Designing a Questionnaire:

- ❑ Have you identified topics that require a questionnaire for gathering information?
- ❑ Are your questionnaire items clear and easy to understand?
- ❑ Are your items free of bias?
- ❑ Is each item focused on a single piece of information?
- ❑ Have you decided on the format for each item (i.e., open-ended or closed-ended)?
- ❑ Are you using appropriate measurement scales for closed-ended items?
- ❑ Is there a logical sequence to the order of the items?
- ❑ Have you tested the questionnaire?
- ❑ Have you planned for quantitative and qualitative data analysis?

For More Information

Alreck, P.L., & Settle, R.B. (2004). The Survey Research Handbook (3rd edition). McGraw Hill Irwin

Athabasca University Centre for Psychology Resources www.cc.gatech.edu/classes/cs6751_97_winter/Topics/quest-design/

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Understanding Survey Research Methods

What is survey research?

Survey research is a way to study individual opinions, attitudes, behaviours, and beliefs by posing a set of questions to a relatively small sample group selected from a target population. If the sample is selected properly, you can draw conclusions about the population from the answers they provided.

What is sampling?

Sampling is a technique for selecting the individuals from the target population whom you will ask to complete the survey. Good sampling ensures that your group represents the target population and that you can apply the information you collect to the general population.

Some of the most common sampling techniques include:

1. **Random sampling:** Participants are selected by non-systematic, random rules. Each member of the population has an equal chance of being selected for the sample.
2. **Proportionate stratified sampling:** If particular characteristics like gender, age, or geographic location are important to your study, you will want to ensure that your sample accurately reflects the population with regard to these characteristics. To do this, you need to *stratify* your population, or divide it into subgroups based on your characteristic of interest, and then randomly select the correct number of people from each subgroup. For example, 38% of the Canadian population lives in Ontario and 24% lives in Quebec. Therefore, in national surveys that are proportionately stratified by province, 38% of the sample is from Ontario and 24% is from Quebec. In some cases, researchers use *disproportionate stratified sampling* to ensure that they have enough people in each subgroup of their sample.
3. **Convenience sampling:** Respondents are chosen for convenience and availability; because each member of the target population does not have an equal chance of being selected for the sample, there is no way to know if the results of the survey can be generalized to the target population.
4. **Snowball sampling:** This technique involves asking individuals who have already responded to a survey to identify additional respondents, and is useful when the members of a population are hard to reach or identify (e.g., people who participate in a particular activity, members of a particular organization). You can use this

technique in conjunction with either random or convenience sampling. This technique also results in a sample that does not represent the entire population.

What is a sampling frame?

A sampling frame is a list from which you select a sample. Examples include telephone directories, membership lists, and directories of organizations or businesses. Your sampling frame should be current, prepared by a reliable source, and include all the people and organizations that are part of your target population.

What is an appropriate sample size?

Generally speaking, the larger a random sample, the more likely it is to represent your target population. However, selecting a large sample is not always possible because it requires a large budget and considerable time. There are statistical formulae available to determine appropriate sample size. To use these formulae, you need to know:

1. the size of your target population;
2. a confidence level that indicates how often your results are likely to be true (usually 95% in social research); and
3. a confidence interval that estimates the likely range of true values in the population if all members of that population completed the survey (usually plus or minus 3% or 4% in social research).

There are online calculators you can use to compute sample sizes such as, calculators.stat.ucla.edu/sampsize.php and www.surveysystem.com/sscalc.htm

How do you administer a survey?

There are two major types of surveys: those that involve an interviewer and those that do not. Your choice should be based on the characteristics of your population, their location, and the type of information you want to collect. Practical issues such as time and budget may also be important.

Interview surveys can be conducted *face-to-face* or by *telephone*. Interviews can provide in-depth, comprehensive information and usually have a higher response rate than self-administered surveys. However, they require a skilled interviewer, a bigger budget, and more time to complete.

Self-administered surveys can be distributed by traditional *mail* or *e-mail*, placed *online*, or distributed to a group of respondents gathered together (e.g., at a meeting). This method is appropriate if your questions are straightforward and/or when the privacy of participants is important. Self-administered surveys are less expensive than interview surveys and take less time to complete. However, it can be difficult to get people to complete these surveys.

How to conduct survey research

Before conducting the survey:

1. Determine what you need to know and from whom you should gather this information.
2. Choose an appropriate sampling technique.
3. Identify a sampling frame.
4. Choose your sample size.
5. Decide how you will administer the survey.
6. Design a questionnaire that is appropriate for your target population and test it (see our *Designing a Questionnaire* Tip Sheet for more information).

During the survey administration period:

1. Check the process of gathering data and ensure that it is working properly.
2. Decide how you will analyze the data (e.g., Excel or SPSS for quantitative data; N6 or NVivo for qualitative data) and develop a template for doing so.

After conducting the survey:

1. Enter the data into your data analysis program and check for accuracy.
2. Conduct appropriate analyses.
3. Organize the results into tables and graphs.
4. Interpret the findings and prepare your report.

Checklist for Completing a Survey:

- ❑ Have you identified your information needs and your population?
- ❑ Have you chosen an appropriate sampling technique?
- ❑ Have you identified a sampling frame?
- ❑ Is your sample size appropriate?
- ❑ Have you developed and tested your questionnaire?
- ❑ Have you chosen appropriate methods for collecting and analyzing data?
- ❑ Have you allocated skilled staff for data entry, data analysis, and report writing?

For More Information

Alreck, P.L., & Settle, R.B. (2004). The Survey Research Handbook (3rd edition). McGraw Hill Irwin.

Athabasca University Centre for Psychology Resources psych.athabascau.ca/html/aupr/tools.shtml#Research%20Methods

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Fritz Scheuren (2004). What is a Survey? American Statistical Association. http://www.amstat.org/sections/srms/

Interviewing For Research

What is an interview?

An interview is a conversation for gathering information. A research interview involves an *interviewer,* who coordinates the conversation and asks questions, and an *interviewee*, who responds to those questions. Interviews can be conducted face-to-face or over the telephone. The Internet is also emerging as a tool for interviewing.

When is an interview an appropriate research method?

Interviews are an appropriate method when there is a need to collect in-depth information on people's opinions, thoughts, experiences, and feelings. Interviews are useful when the topic of inquiry relates to issues that require complex questioning and considerable exploration. Face-to-face interviews are suitable when your target population can communicate through in-person conversations better than communicating through writing or phone conversations.

Types of Interviews

You can design interviews depending on the needs that are being addressed and the information you require. They can be grouped into three types:

1. **Structured interviews:** In a structured interview, the interviewer asks a set of standard predetermined questions about particular topics in a specific order. The respondents select their answers from a list of options. The interviewer may provide clarification on some questions.

   Structured interviews are typically used in surveys. See the *Understanding Survey Research Methods* Tip Sheet for more information.

2. **Semi-structured interviews:** In a semi-structured interview, the interviewer uses a set of predetermined questions and the respondents answer in their own words. Some interviewers use a topic guide that serves as a checklist to ensure that all respondents provide information on the same topics. The interviewer can explore additional areas based on the respondent's answers or ask supplementary questions for clarification.

   Semi-structured interviews are useful when you need to collect in-depth information in an orderly manner from a number of respondents or interviewees (e.g., teachers, community leaders). They can provide both quantitative and qualitative data.

3. **Unstructured interviews:** In an unstructured interview, the interviewer has no specific guidelines, restrictions, predetermined questions, or list of options. The interviewer asks a few broad questions to engage the respondent in an open, informal, and spontaneous discussion. The interviewer also explores responses with further questions and investigates inconsistencies to gather more in-depth information on the topic.

   Unstructured interviews are particularly useful for getting the stories behind respondents' experiences, or when there is little information about a topic. They can produce in-depth qualitative data from a number of key informants on a specific topic. The depth of data, however, depends on the interviewer's skills.

How to conduct an interview ◄

Before the interview

1. **Define your objectives.** Identify what you want to achieve and the information you need to gather. Make sure an interview is the appropriate way to meet your objectives.
2. **Choose the type of interview.** Review your required information, budget, time, and potential respondents and decide whether you need to conduct structured, semi-structured, or unstructured interviews.
3. **Choose the appropriate respondents.** Depending on the type of interviews, decide on the characteristics you want in your interviewees and the number of interviews required.
4. **Decide how you will conduct the interviews.** Consider telephone or face-to face interviews. For large surveys, consider computer-aided interviewing and recording.
5. **Decide how to recruit your respondents.** Obtain contact information for a larger number of respondents than the number of interviews you need because some may not respond. Contact them in person by phone, e-mail or regular mail and introduce yourself, your organization, and your project. Explain the purpose of the interview, the importance of their participation, and set up an appointment.
6. **Decide how you will record the interviews.** Depending on the type of interview, you may fill in a prepared form, use written notes, voice recorders, or computer-aided devices.

7. **Make a list of questions and test them with a sample of respondents.** The questions must be appropriate for the type of interview you choose. If you are running structured interviews, see our Tip Sheets on *Designing a Questionnaire* and *Understanding Survey Research Methods* for more information.
8. **Decide who will conduct the interviews.** For unstructured interviews, you may need to hire skilled interviewers. Develop and provide them with an information kit that includes an introduction to the research topic and instructions.

During the interview

1. Introduce yourself and start a friendly but professional conversation.
2. Explain the purpose of your project, the importance of their participation, and the expected duration of the interview.
3. Be prepared to reschedule the interview if a respondent has a problem with the timing.
4. Explain the format of the interview.
5. Tell respondents how the interview will be recorded and how the collected information will be used. If possible obtain their written consent to participate.
6. Ask respondents if they have any questions.
7. Control your tone of voice and language. Remain as neutral as possible when asking questions or exploring issues.
8. Keep the focus on the topic of inquiry and complete the interview within the agreed time limit.
9. Ensure proper recording. Without distracting the respondent, check your notes and voice recorder regularly.
10. Complete the session. Make sure you have asked all your questions, explain again how you will use the data, thank the respondent, and ask them if they have any questions.

After the interview

1. **Make sure the interview was properly recorded.** Make additional notes if needed.
2. **Organize your responses.** You'll need to transcribe the responses from unstructured and semi-structured interviews, and enter responses from structured interviews into a data analysis program.
3. **Get ready for data analysis.** Search for resources for analyzing qualitative and/or quantitative data.

Checklist for Conducting an Interview

- ❑ Have you identified the research questions that you want to address through interviews?
- ❑ Have you chosen the appropriate type of interview?
- ❑ Have you selected an interviewer?
- ❑ Have you prepared the list of questions for interviews? Have you tested them?
- ❑ Have you decided on the setting of interviews and how responses should be recorded?
- ❑ Have you contacted your respondents and set up appointments?
- ❑ Have you obtained enough data for analysis?

For More Information

Gubrium, J.F & Holstein, J.A. (2001). Handbook of interview research: context and method. Thousand Oaks, California: Sage.

Crawford, I.M. (1997). Marketing Research and Information Systems, Food and Agriculture Organization of the United Nations, http://www.fao.org/docrep/W3241E/w3241e06.htm#types%20of%20personal%20interview

McNamara, C. (1999). General Guidelines for Conducting Interviews, Authenticity Consulting, LLC, www.managementhelp.org/evaluatn/intrview.htm

APPENDIX 6: EVALUATION REPORT TEMPLATE

Review the corresponding sections of your project evaluation plan and present either the same statements or any revisions made during the course of your project.

1) Project Goal(s)

2) Project Objectives

3) Project Activities

Provide a list of project activities that were completed and their outputs. [14]

[14] Outputs are the direct products of your project activities (e.g., the number of workshops delivered, the number of volunteers involved).

4) Project Outcomes

Provide a list of any planned or unplanned positive outcomes of this project. Indicate the outcomes that were achieved and those you anticipate will be achieved within the next six months. [15]

[15] Outcomes are changes that participants or other stakeholders of your project experience as a result of their involvement in your project. These changes could be behavioural or organizational. Short-term outcomes usually occur gradually, but some may occur during the project. Intermediate outcomes occur right after the completion of the project.

5) Evaluation Results

Indicate the results you obtained from collecting data through the use of evaluation tools.

Tool:
How (or where) was the tool used?
From whom or where was the data gathered (i.e., source of data)?
What are the main results obtained from the data?

6) Evaluation Questions and Answers

Review the evaluation questions listed in your project evaluation plan and address them based on your interpretation of the results.

Evaluation Question:
Answer:

Evaluation Question:
Answer:

7) Conclusions

Describe, overall, (a) how your project objectives were met, (b) how the purpose of the evaluation was accomplished, and (c) how the procedure of project evaluation was completed.

8) Recommendations

Explain (a) what the practical aspects of your evaluation are and how the results can be used, (b) what changes you would make to your project if you were to carry it out again, and (c) what suggestions you have for other organizations that may want to conduct a similar project.

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