Evaluation Resources

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United Way
Toronto & York Region

Cathexis

Contents

Introduction

What is this package?

This package contains resources on evaluation. These resources include summaries of key topics in evaluation, and information on where you can learn more about specific evaluation tools or approaches. The package also includes information on evaluation training options.

Why did UWTYR create this package?

United Way Toronto & York Region (UWTYR) believes in a strong network of community services. Social services play a critical role in the Greater Toronto Area, and evaluation is an important part of good programming. Evaluation supports learning, program improvement, and accountability. UWTYR recognizes the importance of evaluation for UWTYR and funded agency programs and initiatives.

We receive requests from funded agencies and our own colleagues within UWTYR for good information on evaluation. While a fair number of evaluation resources and tools already exist online and in print, it can be difficult to sort through them all and find information that is clear and relevant to the needs of community organizations. That is why we decided to put together a package of evaluation resources for funded agencies and UWTYR staff.

How did UWTYR create this package?

UWTYR worked with Cathexis consulting, a Toronto consulting firm that specializes in evaluation, to put together the package. UWTYR shared some preliminary ideas with a small group of funded agencies to get feedback on the overall project. As part of the development process, Cathexis consulting also did a focus group with 10 funded agencies, and revised the resources based on their input. Staff members from different teams in UWTYR reviewed and provided feedback on the final products.

What's in this package?

The package has three parts:

1. A series of ten brief evaluation backgrounders that introduce and explore key evaluation topics and terminology;
2. A directory of evaluation resources focusing on technical aspects of evaluation; and
3. A directory of evaluation training options available to organizations based in the Greater Toronto Area.

Evaluation is an ever-changing field. In order to make sure the information in this package remains useful, UWTYR staff will review and update the materials every year.

What can this package help me with?

We hope that this package will be useful to funded agencies and UWTYR staff. The package includes information that can help support a common understanding of key evaluation topics.

The backgrounders can also help inform planning and discussion at different stages of an evaluation. It also includes information on where to find resources in areas such as evaluation tools/ approaches/ collecting and analyzing data and sharing findings.

What is the intended use for this package?

We hope that this package can be one of the tools that funded agencies and UWTYR staff use to support their evaluation work. However, it is important to note that this package does not represent a specific UWTYR expectation about evaluation.

Evaluation is a complex area and we know that that there are many factors that influence evaluation decision-making in community organizations. This package is not intended to address everything that an organization would consider in planning, implementing and using evaluation. Rather, these resources are intended to provide general support in evaluation and are not meant to be a comprehensive list of evaluation topics or resources.

About the Authors

These resources on evaluation were developed by Cathexis Consulting Inc. Cathexis is an Ontario-based consulting firm that specializes in evaluation and measurement.

For more information, please visit Cathexis' website at www.cathexisconsulting.ca. They can be contacted at info@cathexisconsulting.ca, or 416.469.9954.

Martha McGuire, C.E.

Martha teaches evaluation to Non-Profit Management Certificate students at Ryerson University School of Continuing Education. She is well versed in the latest issues facing non-profits and has frequent opportunity to discuss potential uses of evaluation and monitoring with emerging voluntary sector managers.

With over 25 years' experience in evaluation and measurement, Martha is a respected leader in the field. She is globally recognized for her understanding of evaluation issues and practices. Through her recent work with the International Organization for Cooperation in Evaluation, Martha has been involved in the development of resources to strengthen evaluation capacity and help create enabling environments for evaluation around the world.

Adina Jacobson, C.E.

Adina is an experienced evaluator, project manager, and group facilitator. She joined Cathexis in 2008 and in that time has been involved over 35 evaluation and applied research projects. She is a graduate of University of Ottawa's evaluation program and a Credentialed Evaluator.

Adina is committed to continuous quality improvement in the practice of evaluation, and frequently presents new and innovative methods to fellow evaluators at Canadian Evaluation Society and American Evaluation Association conferences. She is keenly interested in making evaluation accessible and useful across the spectrum. Many of her evaluation experiences have involved building evaluation capacity in third sector organizations or programs that provide services to marginalized populations.

Part 1:

Evaluation backgrounders

Evaluation Backgrounders

1. What can evaluation do for me?

Evaluation is more than an accountability requirement. An important part of any community organization's tool kit, evaluation can help you better meet the needs of your clients and community. Evaluation should be useful, informative and (hopefully) fun.

Evaluation is a systematic process for answering questions like:

- What works well and what could be improved?
- Is this the best way to meet our community's needs?
- Are we reaching our goals?
- Are our goals the right goals?

Evaluation takes time and resources, but it doesn't always need to be a *lot* of extra work. Even when you are not doing formal evaluation, small steps can improve your work. Building opportunities to gather information, reflecting on learnings, and making necessary adjustments (small *or* big) is what we call evaluative thinking.

Evaluation use

Considerations for success

Meaningful evaluation is a part of a program or initiative cycle. You might use different types of evaluation or evaluation tools at different program stages.

- **During planning** a needs assessment can help set goals and plan the best way to reach them,
- **Ongoing monitoring** helps keep track of successes and challenges so that you can adjust activities along the way,
- **Periodic evaluation** can assess a program's outcomes, how the program generated the outcomes and any implications.

Evaluation is only valuable if someone uses it. Instead of trying to be everything to everyone, it is helpful to clarify:

- **Primary audience(s)** – Who will benefit from the evaluation? Who will put the findings to work?
- **Evaluation needs** – What do they hope to accomplish? What will evaluation data be used for?
- **Context** – What is happening in the organization or community that may help or hinder the use of an evaluation?
- **Knowledge sharing or mobilization** – How can you ensure that stakeholders truly understand the findings? What is the best way to reach them?

EVALUATION CAN IMPROVE PROGRAMS!

Sip Smart! is an educational program designed to help grade 4, 5, & 6 students make healthy drink choices. **Sip Smart!** built evaluation into their program from the beginning, and used these lessons to guide improvement. For example, the evaluation found that program content was not suitable for all grades. As a result, the program was split into level one and level two. Now the different groups can learn in an age appropriate way.*

*For more on Sip Smart! go to www.dotcms.bcpeds.ca/sipsmart/success/

For an evaluation to be meaningful, it must also be trusted. Credibility is increased when an evaluation:

- Draws on **multiple data sources**, using multiple data collection methods,
- Is completed by **competent evaluators** (internal or external),
- Is conducted in an **ethical manner** with respect for individuals.

To learn more, see: Jane Davidson's Actionable evaluation basics, www.realevaluation.com/read/minibooks/ *and* Better Evaluation's blog post on how evaluation can make a difference, www.betterevaluation.org/blog/report-support-use. Want more? See the *Directory of evaluation resources*.

2. What is involved in evaluation?

Service providers evaluate every day. You talk to your clients and community members, you learn about their strengths and challenges, and you adapt. The only difference between this and 'doing an evaluation' is scope. The larger the evaluation, the more there is a need for a systematic process.

Evaluation has two main phases: plannig and implementation.

Planning the evaluation

Investing time and resources in good planning will contribute to a useful, stress free evaluation. It's helpful to write down your evaluation plan and post it where everyone involved can have easy access.

1 **Identify stakeholders** – Your stakeholders are the reason for the evaluation and the means for completing it. Who will be affected? Who will do the work? Who will provide information? Who will use the findings?

2 **Describe the program** – It's important to fully understand what a program does and how it is supposed to impact your clients. A logic model or theory of change may help to clarify what your program does and why.

3 **Focus the evaluation** – Clearly identify what you hope the evaluation will accomplish and for whom. Based on these goals, develop evaluation questions. It's important to set realistic priorities, balancing your information needs with available time and money.

4 **Choose a design and methods** – There is no one right way to do an evaluation. Consider where you can get information (sources), the best way to gather, analyze and report (methods), and the time and resources you have available. A table that shows the alignment between each evaluation question, data source, methods, and the required resources may help to keep this organized.

Implementing the evaluation

Conducting the evaluation is (relatively) easy when you're following a thoughtful plan. Try building in regular check-ins to ensure you are on track, and identify any necessary changes to the plan.

5 **Collect information** – Rigorous evaluation should build on more than one data source (e.g., clients, staff, files, etc.) and method (e.g., interviews, surveys, document review, etc.).

6 **Analyze and interpret findings** – Data falls into two main categories: quantitative (numbers) and qualitative (stories and descriptions). To analyze quantitative data you may want to look at frequencies, percentages, averages, or ranks. With qualitative data you will want to look for themes, patterns, differences and examples. Both will need to be placed in context and interpreted. Try bringing together a range of stakeholders to put together the puzzle pieces.

7 **Develop recommendations and action plan** – You have answers to the evaluation questions; so now what? A set of recommendations (based on the findings) and an action plan for implementing them can help move from a report to better service. Try engaging key stakeholders to ensure that recommendations are realistic and framed in an easy to digest manner.

8 **Share learnings and act** – Build in time to share your new knowledge and use it to improve services. You may want to develop an action plan that outlines what recommendations you will implement and when (prioritizing those that are most critical and easiest to do).

Considerations for success

- **Involve stakeholders** at all stages. This can lead to better data, a smoother process, and a greater chance that the evaluation will have a positive impact.
- **Adapt this model** to meet your community's needs. Maybe your organization needs to interpret focus group findings before choosing other methods. Maybe your analysis shows that the original logic model was off. It is okay to revisit these steps and revise things as you go along– evaluations rarely work in a linear manner.
- **Share learnings and act** throughout the process. You can often start making improvements long before developing a formal action plan. Look for natural opportunities and build in regular checks.

To learn more, see: the Kellogg Foundation's evaluation handbook, www.wkkf.org/resource-directory/resource/2010/w-k-kellogg-foundation-evaluation-handbook *and* Imagine Canada's project evaluation guide, www.sectorsource.ca/sites/default/files/resources/files/projectguide_final.pdf. Want more? See the *Directory of evaluation resources*.

3. How do I know when it's the right time to evaluate?

Community organizations are often required to do evaluation. This can be an opportunity to improve programs, share best practice, advocate for additional funding and more. It can also be a costly, and time consuming process. In order to make the best use of evaluation, it's important to ensure that your program is ready to be evaluated and that the right type of evaluation is being done.

Evaluability assessment is one way to prepare your program for evaluation. It helps determine if evaluation is justified, feasible, and likely to be useful. If your program isn't ready, an evaluability assessment will point to steps you can take to prepare for evaluation. If your program is ready, an evaluability assessment can help decide what sort of evaluation is most appropriate.

An evaluability assessment will generally cover five main questions:

Do stakeholders agree on program goals?

Before evaluating a program, you should be clear on what the program is supposed to accomplish. If key stakeholders don't have a common understanding of what success looks like, then how will you ever know if it has been achieved?

Start by clearly describing the program and its goals (e.g., through a logic model or theory of change). If you don't have the information to do this, try starting with a needs assessment to determine what the program goals *could* be and then prioritize to determine what they *should* be.

Are sufficient resources available?

Evaluation does not need to take significant time or money, but it will require some.

It's best to address resource challenges from both directions: look for ways to scale back the evaluation (e.g., prioritizing a small number of questions) and look for ways to scale back the effort. Try incorporating evaluation into your day to day activities – maybe your existing intake form can be modified to provide some of the information needed.

Is anyone interested in the findings?

Evaluation is most useful when there is a clear intention about what each stakeholder hopes to accomplish and how they will use the information.

Work with your stakeholders to truly understand what they hope the evaluation can accomplish. If the evaluation is an accountability requirement, look for value-added opportunities to improve client service.

Is there opportunity for change?

Occasionally there are constraints beyond a program's control that keep evaluation findings from being used. This might include policy, available services, competing priorities, timing, etc.

If there is absolutely no opportunity for change, this may not be a good time for a full evaluation. Try focusing on building a learning culture where you can incorporate evaluation tools and techniques in a less formal way.

Can you get the right information?

Evaluation involves gathering, exploring and interpreting information about the services your organization offers. In some cases it may be challenging to gather the information you will need.

Consider different evaluation approaches or methods that can build on information that is easy to access. This may also be an opportunity to identify what information you will need and start a performance monitoring system to collect it.

IF YOU AREN'T SURE ABOUT EVALUATION, START WITH AN EVALUABILITY ASSESSMENT.

Let's say you run a skills training program for people with disabilities. You're required to complete an evaluation but are concerned that it might not be the right time.

You start with an evaluability assessment and learn that the province is in the middle of developing new legislation about services for people with disabilities. Regardless of the evaluation findings, your organization will be spending the next few years focused on this new legislation.

You submit the evaluability assessment findings to your funders. Together you decide to wait and conduct a formative evaluation once the new legislation is finalized.

To learn more, see: The Juvenile Justice Evaluation Center's guide to evaluability assessment, www.jrsa.org/pubs/juv-justice/evaluability-assessment.pdf, *and* the Handbook of Practical Program Evaluation. pg 33-41 www.themedfomscu.org/media/Handbook_of_Practical_Program_Evaluation.pdf. Want more? See the *Directory of Evaluation Resources*.

4. How do I choose the right evaluation questions?

The ‘perfect evaluation’ should occur for good reason, fit your budget, be planned at the beginning of an initiative, answer only the most important questions, and inform action on key priorities. A perfect evaluation is rare and adjustments are often needed.

Identify evaluation users

Set evaluation goals

Develop evaluation questions

Much like designing a program, designing an evaluation starts with setting goals. Before leaping to measurement it is important to consider who will use evaluation findings and what they will be used for. In each step, it is be important to set realistic priorities to keep the evaluation manageable.

Identifying users and setting goals

Let’s say you were developing an ESL program. English is a big subject. So you plan by clarifying that this ESL program is for newcomers with basic English skills, who are seeking employment. You also determine that these clients will learn business English in order to be more employable.

Planning an evaluation works the same way. You should think through:

- **Who will use the evaluation?** Who will learn? Who will make decisions based on findings? Whose actions may change?
- **How will the lessons learned be applied?** What do you hope to change? How can the evaluation contribute?

Some common evaluation user-goal combinations are:

Funders

- Learn about best practices & service needs
- Guide decision making

Program staff

- Improve programming
- Learn about best practices
- Build capacity

Policy makers

- Inform policy and funding decisions

Other practitioners

- Learn about best practices
- Inform program design

Developing evaluation questions

Evaluation questions are used to guide the overall evaluation process. By answering these questions, the evaluation should gather the information you need to meet the stated goals. Evaluation questions are not the questions you ask interview or survey respondents, but they will help you develop your data collection tools later on.

Generally, evaluation questions fall into five main categories:

- **Relevance**, e.g., Is the ESL program (still) needed? Is it the right solution for newcomers seeking employment?
- **Implementation**, e.g., How well designed is the ESL program? Is the program being implemented as planned? What parts of the ESL program work best and why?
- **Outcomes**, e.g., Have the clients improved their business English? How else have their lives changed?
- **Efficiency**, e.g., Is the improvement in language skills worth the cost of the classes? Is this the most efficient way to help newcomers become more employable?
- **Sustainability**, e.g., How sustainable is the ESL program and its impacts? What is needed to maintain success?

CHOOSE YOUR EVALUATION QUESTIONS STRATEGICALLY!

"Far better an approximate answer to the right question, which is often vague, than an exact answer to the wrong question, which can always be made precise."

– John Tukey

Considerations for success

- **One evaluation doesn't need to address every possible question**. Focus on a few questions that will meet needs now.
- Choose evaluation questions that **directly address evaluation goals** and be explicit about how they will do so.
- **Engage stakeholders** (particularly the primary users) in developing questions.
- Choose **big picture** questions to guide the evaluation. You'll get to the details later.
- **Adapt good ideas** from other evaluations to your context.

To learn more, see: IDRC Evaluation guideline on identifying the intended user(s) and use(s) of an evaluation, www.idl-bnc.idrc.ca/dspace/handle/10625/47278 *and* Jane Davidson's Actionable evaluation basics, www.realevaluation.com/read/minibooks/. Want more? See the *Directory of evaluation resources*.

5. What type of evaluation is right for my program?

It depends. At each stage of a program's development, different types of evaluation can help improve services and ensure that the program is truly improving lives. The real question is "What type of evaluation is right for my program, right now?"

Let's say you are non-profit with a mandate to increase high school completion rates in a priority neighborhood. You know that a large number of high school students get poor grades and eventually drop out. **As the program matures, you use different types of evaluation** to ensure that this program is the best way to help students.

You start with a **needs assessment**, talking to youth about why high school is so challenging. They tell you that it's hard to pay attention in the morning. You read that in other schools, breakfast programs help students to concentrate in the mornings. Based on this information, your organization starts a breakfast program.

As the breakfast program gets organized, you regularly check in with students and teachers conducting **developmental evaluation**. They tell you that some students can't eat the breakfast because of dietary restrictions. You add culturally appropriate options.

In the second year, you do a **formative evaluation** to identify areas for improvement. You find out that the company contracted to provide breakfast has been serving sugary cereals to cut costs. You hire a new company that will stick to the menu plan.

At the end of the second year, you do a **summative evaluation** and find that student grades have been improving. You decide to expand the program to three other schools.

Learning about context and client needs

Before a program starts, its developers learn about the community context and needs. This is called a **needs assessment**. It uses evaluation methods and evaluative thinking to find out:

- Who needs what kinds of service?
- What services are already available?
- What services have proven to be effective?
- Are there enough resources to address the need?

Doing a needs assessment is often the first step in planning a new program or updating a mature program.

Rapid feedback and revision

When starting a new program, new information emerges constantly. A quick feedback cycle to learn about these changes and improve the program is called **developmental evaluation**. A developmental evaluation:

- Adjusts as the program changes,
- Is built into the program so that it is carried out over a longer period of time,
- Changes its evaluation questions as information needs change, and
- Changes its methods as the evaluation questions change.

Ongoing course correction

Once your program is in place it's important to occasionally 'check-in' and ensure that it is going according to plan and that the plan is sound. This is called **formative evaluation** and asks questions like:

- Is the program being implemented as planned? If not, why?
- What parts work well, for whom, and why?
- What parts don't work well, for whom, and why?

Formative evaluation provides staff and managers with information for ongoing course correction.

EVALUATION PLAYS DIFFERENT ROLES AT EACH PROGRAM STAGE.

"When the cook tastes the soup, that's formative; when the guests taste the soup, that's summative."

– Robert Stake

Assessing results

As a program matures, you will likely want to ensure that it is meeting its goals. **Summative evaluation** answers questions like:

- Does the program improve the lives of clients?
- Are there any unanticipated outcomes (either negative or positive)?
- Is the program the most efficient way to meet these goals?

Summative evaluation is used to support decisions about whether a program should be expanded, revised, copied, scaled back, or cut.

Considerations for success

- Sometimes it may be best to incorporate different evaluation types. You might want to know if a program is achieving its goals (summative) and which parts are most helpful (formative).
- Some programs may phase through all of these types of evaluation while others may stick to one or two.

To learn more, see: the Evaluation Handbook www.wkkf.org/resource-directory/resource/2010/w-k-kellogg-foundation-evaluation-handbook *and* the Developmental Evaluation Primer http://events.tamarackcommunity.org/library/a-developmental-evaluation-primer. Want more? See the *Directory of evaluation resources*.

6. How do I involve stakeholders in my evaluation?

Evaluation is ultimately about and for people. Those people who are most impacted by evaluation are considered "evaluation stakeholders." Involving these key players throughout the evaluation process helps to make sure that it is used by and useful to those who it affects.

INVOLVING STAKEHOLDERS MAKES EVALUATION MORE USEFUL

"Transformative research and evaluation emphasize the inclusiveness of groups that have historically experienced oppression and discrimination… in a conscious effort to build a link between the results of the [evaluation] and social action."

- Donna Mertens

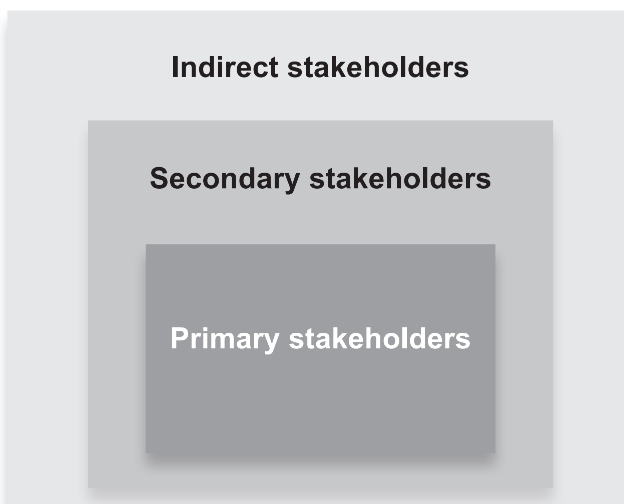
Involving stakeholders leads to evaluation that is more useful, relevant, and credible. Meaningful stakeholder involvement helps with:

- Asking better questions,
- Making evaluation painless (and even fun),
- Collecting more accurate information,
- Understanding context,
- Developing more realistic recommendations,
- Building buy-in for recommendations and program improvement, and
- Building new capacity, skills, and collaborations.

Who are the stakeholders?

An evaluation stakeholder is anyone who may:

- **Be affected by the evaluation** – Will the evaluation findings change the services clients receive? What about the jobs of program staff?
- **Implement the evaluation** – Will clients or staff be asked to share their knowledge? Will they be involved in data collection, interpretation or reporting?
- **Use evaluation findings** – Who is the target audience of the evaluation? Will the lessons inform staff, funders, policy makers, etc.?



Answering these questions may help you prioritize stakeholders, identifying which groups are primary (i.e., *must* be involved), secondary (i.e., *should* be involved) and indirect (i.e., nice to have).

Steps for involving stakeholders

Engaging evaluation stakeholders generally involves four main steps.

Set evaluation goals	List individuals and groups who may be affected by the evaluation, are necessary to implement the evaluation, or will use the evaluation findings. Consider clients, staff, funders, other practitioners, policy makers and (in some cases) the general public.
Prioritize	It is not always practical or appropriate to involve all of an evaluation's stakeholders in every step. Consider the benefits and drawbacks of involvement, as well as available time and money.
Develop a strategy	Consult with high priority stakeholders about the best way to make use of their expertise. Consider opportunities to involve stakeholders during planning, data collection, analysis, reporting and putting findings into action.
Engage stakeholders	Put your stakeholder engagement strategy into action, involving key players in developing the evaluation plan, collecting and interpreting data, and sharing your learnings. Check-in regularly to ensure your engagement strategy is helpful and feasible.

How much involvement is right?

All evaluations involve stakeholders to some extent. The right amount of involvement depends on your goals, stakeholder interest/capacity, and resources available.

Common stakeholder roles include:

- **Steering or advisory committee** that meets with the evaluation team regularly to provide input,
- **Data collection participant** who shares their story or knowledge (e.g., is interviewed, completes a survey, etc.), and
- **Evaluation team member** – It is sometimes appropriate to involve stakeholders as a full part of the evaluation team. For example, youth with training in interview techniques may be more effective in collecting information from their peers.

To learn more, see: the Robert Wood Johnston Foundation's guide for engaging stakeholders in developing evaluation questions, www.rwjf.org/pr/product.jsp?id=49951 *and* Better Evaluation's tips, www.betterevaluation.org/plan/manage/identify_engage_users. Want more? See the *Directory of evaluation resources*.

7. How do I make sure my evaluation is ethical?

Like any activity involving people, evaluation has risks. And it's everyone's responsibility to ensure that risks are minimized and benefits are maximized – whether you're conducting your own evaluation or hiring an external evaluator.

In each evaluation you will need to make decisions about the most ethical way to collect, analyze and share information. These decisions should be guided by two key concepts: concern for the people involved in an evaluation, and concern about the impact of the evaluation.

Ethical evaluation + **Concern about the people involved** = **Concern about the impact**

Concern about the people involved

Many evaluations gather information from people in vulnerable positions. It's important to make the welfare of the people involved a top priority. Only involve people who voluntarily agree to participate and who have a full understanding of how they will be involved. Participants should be fully informed on the following

- **Right to decline** – Reassure participants that if they choose not to be involved, it won't affect the services they receive.
- **Confidentiality** – The level of privacy may range from total anonymity (e.g., an online survey where even the evaluation team doesn't know who responded) to total transparency (e.g., a participant profile with pictures). Most evaluations land somewhere in the middle (e.g., evaluators know who the participants are but don't report with names).
- **Use of data** – Participants have a right to know how their information will be used and who will have access to it. It's usually a good idea to share back a summary of findings with participants.
- **Benefits and risks** – All evaluation includes some benefits (e.g., letting staff know how to better serve you) and risks (e.g., triggering traumatic memories). Look for the best possible balance, and be upfront about it.

UNETHICAL RESEARCH

There is a long history of unethical research in Canada and around the world. As a (relatively) new field, evaluation can learn from the issues raised through unethical studies such as the Tuskegee Syphilis Study.

(See:http://www.cdc.gov/tuskegee/timeline.htm).

Concern about the impact

You also have a responsibility to ensure that evaluation does not mislead stakeholders. This means that evaluation should:

- Collect and analyze information in a systematic, accurate way,
- Bring together all relevant perspectives,
- Be transparent about methods used and any limitations, and
- Present findings honestly.

Common questions

There are no easy answers in any of these scenarios. Use your best judgment, consult with more experienced colleagues, and read up on the guidelines for evaluation and your profession.

- **Does the evaluation participant truly understand what they are agreeing to?** Technical consent forms may be dense and difficult to understand, use plain language and talk through any written forms.
- **What if I'm asked to change the findings?** Sometimes an evaluation can result in unexpected or undesirable findings. You can always add more context, but cannot hide results. Remind your stakeholders that it's better to know where the program can be improved than to continue unaware.
- **Can I offer an incentive?** It's often helpful to provide evaluation participants with a token of thanks (e.g., money for their time). Be careful that participation is still voluntary. The value of the incentive should not be so great that they will feel they must participate.
- **Data has been collected for another purpose (e.g., intake or fundraising databases), can I use it for evaluation?** It depends on what clients were told when they shared their information. Check if you already have any consent forms that spell out how the data will be used and who can access it.

To learn more, see: the Canadian Evaluation Society Guidelines for Ethical Conduct, www.evaluationcanada.ca/ethics, the Tri- Council Policy Statement on Ethical Conduct for Research Involving Humans (and online tutorial), www.pre.ethics.gc.ca/eng/policy-politique/initiatives/tcps2-eptc2/Default/ ***and*** **tools from the Alberta Innovates - Health Solutions' A Project Ethics Community Consensus Initiative, www.aihealthsolutions.ca/outreach-learning/arecci-a-project-ethics-community-consensus-initiative/. Want more? See the** ***Directory of evaluation resources*****.**

8. How do I make sure my evaluation gets used?

Evaluation is a tool that can improve programs, policies, and people's lives. But for it to have any of these impacts, the lessons learned through evaluation need to be put into practice.

Let's say you run a leadership program for at-risk youth. Your program uses an innovative peer mentorship model. An evaluation is required. This could be an accountability exercise, it could also be an opportunity to gather information that will help better serve clients.

A useful evaluation has four key characteristics. It's **needed, trusted, understood, and actionable**. Creating this type of evaluation takes planning and communication.

Useful evaluation supports positive change. It can:

- Inform decision making
- Develop knowledge & skills
- Influence broader social change
- Increase collaboration
- Support accountability

Fill a need

Before jumping into evaluation, it's important to consider who will use the findings and what they will be used for. An evaluation should have specific, utilization focused goals.

Utilization focused goal
Learn about best practices in peer mentorship so that you can improve the leadership program.

Non-utilization focused goal
Describe the peer mentorship program.

Considerations for success:

- **Plan how the evaluation will meet your needs upfront**. If you wait until the end, you may miss an opportunity to get the most useful information.
- **Involve key stakeholders** (especially those who will be expected to use the evaluation) in identifying needs and setting goals.
- If you can't agree on what the evaluation needs are, you may not be ready for a full evaluation. **Try starting with an evaluability assessment.**[i]
- **Prioritize your goals.** It's better to have an evaluation that meets a few goals than an evaluation that takes on too much.

Create trust

Evaluation findings only get used if stakeholders believe that they are credible. Findings should be collected/analyzed using sound methods *and* should be reasonable given the context.

Credible reporting
We spoke with about ½ of the clients, their parents, and their teachers. Because all three groups said the same thing, we're fairly certain that it's true.

Less credible reporting
We did a survey so we know what the situation is.

Considerations for success:

- **Spend time** to fully understand the context and concerns of your stakeholders.
- **Be transparent** about the methods used and any limitations.
- **Build your credibility** as someone who has the community's best interests at heart.
- Programs are rarely perfect. **Recognizing areas for improvement** ensures more balance in reporting.

Build understanding

Before anyone can make use of an evaluation, they need to understand it. This means understanding both the process (e.g., methods) and products (e.g., reports). Collect information and measures of success that are meaningful to your stakeholders.

✓ **Meaningful data** 30 out of 40 youth (¾) improved their grades.	✗ **Less meaningful data** 30 youth improved their grades.

Considerations for success:

- **Involve key stakeholders** in all stages of the evaluation so that they fully understand why the evaluation is taking place and where the recommendations come from.
- **Use alternative reporting tools** (e.g., presentations, infographics, videos, etc.) to communicate findings in a way that is relevant and interesting.
- **Keep it simple**. Report findings in a manner that is easy to understand.
- **Explore the reasons** behind any findings. Stakeholders may be more open to using findings if they understand why recommendations have been made.

Plan for action

Action planning starts when you initially identify evaluation goals and continues on to planning for how recommendations will be implemented. The evaluation is not over when you describe the findings, it keeps going until you decide what to do with them.

✓ **Concrete action plan** Nisa will start a recruitment campaign to find more female peer mentors. We hope to have 20 new volunteers by September. Nisa will devote 5 days to the campaign and has a budget of $5,000.	✗ **Less concrete action plan** We will implement the evaluation recommendations.

Considerations for success:

- **Make your action plan concrete**. Identify which recommendations you will act on, what the expected results are, how you will follow through, who will be responsible, how much it will cost, and when it will be completed by.
- **Involve key stakeholders** in deciding the 'how', 'when' and 'who' of putting findings into action.
- **Align action with important dates**, like the start of a new program cohort, so that the timing makes sense.

To learn more, see: Utilization focused evaluation (full book by Michael Quinn Patton or free online primer, https://evaluationinpractice.wordpress.com/) and Jane Davidson's Actionable evaluation basics, www.realevaluation.com. Want more? See the *Directory of evaluation resources*.

i For more on evaluability assessments, see '*How do you know this is the right time to evaluate?*'.

9. What can performance monitoring do for me?

What gets measured gets done. If you measure success then you can reward it, encourage it, and duplicate it. Demonstrating results can also win public support.

Performance monitoring (also called performance measurement) allows managers to:

- Continuously monitor and assess program results,
- Quickly identify successes and challenges,
- Make informed decisions and take action in an appropriate, timely manner,
- Report in an effective and relevant manner.

Performance monitoring or evaluation?

Performance monitoring (also called performance measurement) tells you **what is happening**. It involves describing, counting, or otherwise tracking indicators of what your program does (activities), creates (outputs), and changes (outcomes). This information is used to identify success and areas of concern on an ongoing basis. It's also a great source of information for future evaluations.

Monitoring
What?

Evaluation
Why?

Evaluation explores **why these outcomes are occurring and what implications this may have**. It helps you to assess the value of a program or strategy. This information is used by a range of stakeholders to make decisions, improve programming, make judgments, and/or inform future policies and programs. Evaluation usually includes making recommendations for improvements.

Monitoring and evaluation answer different types of questions:

Monitoring Questions

- Which people are we reaching?
- What activities have we completed?
- What are the results?

Evaluation Questions

- Are we reaching the right people?
- What activities worked well and what could be improved? What works for whom in what context?
- Are the results worth the costs?

Monitoring and evaluation work best when they go hand in hand. Use monitoring as an ongoing management tool with periodic evaluation to learn what monitoring results really mean for your program.

Developing monitoring indicators

Let's say you're running a program that helps clients to exit poverty through self-employment. You'll want to know if the program has helped clients start their businesses (an outcome). The percentage of clients who start a business is one indicator of success.

Performance monitoring should be strategic. No program can (or should) track every activity, output and outcome. Each indicator should provide information that helps you meet your goals.

To choose performance indicators:

1 **Identify your goals** – Your stakeholders are the reason for the evaluation and the means for completing it. Who will be affected? Who will do the work? Who will provide information?

2 **Engage stakeholders** – Find out what sort of information would be meaningful to the people who will actually be using the data.

3 **Look to the literature** – Find out what sort of indicators similar programs have used. Adapt what works for you and ignore the rest.

4 **Prioritize** – Take your list of 'nice to knows' and narrow this down to a list of 'need to knows'. Then shorten it again by focusing on what you need to know *now*.

Considerations for success

- **Setting targets** can be challenging. Make your targets aspirational, but **achievable.**
- **Use both quantitative and qualitative** indicators (i.e., numbers *and* stories).
- **Build performance monitoring** into your regular activities and set time aside to review and reflect.
- **Update indicators frequently** to keep them relevant and up to date.

MONITORING DRIVES CHANGES IN PERFORMANCE. CHOOSE YOUR INDICATORS WISELY!

In some places, the performance of furniture factories has been measured based on the total weight of furniture built. The result of choosing this indicator was that some companies responded by making *heavier* furniture instead of making *more* furniture.

To learn more, see the Ontario Public Services' performance measurement guide. http://portal.publicpolicy.utoronto.ca/en/ContentMap/budgetingandfinancialmanagement/AdditionalResourcesFinancialManagement/Financial%20Mangement%20Documents/Performance%20Management/Performance%20Measurement%20Guide.pdf. Want more? See the *Directory of evaluation resources*.

10. What evaluation challenges can I expect – and how can I address them?

Every evaluation has its challenges and limitations. Many of these challenges are fairly common and can be addressed before they happen, with good planning. However, no matter how well you plan, no evaluation is perfect - unanticipated challenges always come up. Remain flexible and responsive while keeping the evaluation's overarching goals top of mind.

Generating buy-in

Evaluation is essentially about people. It relies on key stakeholders to share information (respondents), guide the process and help interpret the findings. However, many people find evaluation a bit scary or may be hesitant to become involved. To create enthusiasm, try to:

- **Clearly explain the evaluation's goals**, emphasizing how it will help better serve clients.
- **Engage stakeholder groups in planning** the evaluation so that they can see their priorities reflected in the workplan.
- **Recognize stakeholder cultures** and traditional ways of gathering/interpreting knowledge in the evaluation plan.
- **Keep surveys and interviews short**. Ensuring timing does not conflict with other events or schedules.
- **Communicate in a style/format that is appealing** to your audience.

Managing resources

In an already overextended organization, it can be difficult to secure the time, people and money to conduct an evaluation. Try to:

- Remind your stakeholders that evaluation is a **short term investment that can have long term gains**.
- **Prioritize your goals and evaluation questions**. It's better to do a small evaluation that meets a need than not finish a large evaluation.
- **Match the right people to the job**. Build on your team's strengths, assigning tasks to people who excel at them (and can probably do them more quickly).

Demonstrating cause and effect

One of the biggest challenges in evaluation is showing that your program is responsible for the changes clients experience. Try to:

- **Acknowledge that perfect certainty is rarely possible**. Focus on building an understanding of what *contributed* to changes as opposed to what *caused* the changes.
- **Gather baseline information** about clients' lives before your program, so that you can compare it to their situations after.
- **Gather information from different people and in different ways** – if they all say the same thing, you can be more confident that it is true.

Staying on time

Most community organizations are working with limited time and staff. Evaluation can be delayed, leaving you with a time crunch come report time. To avoid this, try to:

- **Develop a concrete workplan** that includes a breakdown of each activity, who is responsible for doing it, and when it must be completed by.
- **Plan regular check-ins** to monitor your progress.
- **Be conscious of the project's key timelines**, since a small delay now could have a large impact later on.

START WITH A SOLID PLAN BUT BE PREPARED TO ADJUST.

"Those who plan do better than those who do not plan, even though they rarely stick to their plan."

-Winston Churchill

Collecting consistent information

Most often you will have a team of people contributing to an evaluation. If they all do things in different ways, you may find it difficult to make sense of your findings. To increase consistency, try to:

- **Develop data collection guides** (e.g., interview guides, surveys, etc.) and protocols for how they should be used.
- **Test tools** to make sure they actually ask what you want to know.
- **Train the team** on how tools should be used.
- **Develop a glossary** of terms to ensure that everyone is using the same language for key concepts.

To learn more, see: www.betterevaluation.org, a website dedicated to sharing information to improve evaluation. Want more? See the *Directory of evaluation resources*.

Part 2:

Directory of evaluation resources

Evaluation Resources

How to use this directory

A. Purpose

This directory of evaluation resources is intended for community agencies who are interested in resources detailing more technical aspects of evaluation. It presents select resources that may be helpful in designing and implementing evaluations.

This directory is not exhaustive and there are many other evaluation resources available. The directory will be updated annually by UWTYR. Please note that the listing of a resource does not imply endorsement by UWTYR.

B. Structure

The directory organized by evaluation topic, with an upfront section on more general evaluation guides/resources that address multiple topics. Readers are encouraged to skip directly to relevant sections based on their existing knowledge of evaluation and current needs.

Evaluation guides/Multi-topic

In this section you will find resources that cover multiple topics to help with planning and implementing evaluations. For example, many of the resources in this section are ‘how to’ guides that address multiple aspects of evaluation. Other resources listed here address broader evaluation issues, such as an evaluation glossary, and how to build a learning and evaluation culture.

A. BetterEvaluation

Creator: BetterEvaluation Consortium

Year: 2013

Cost: Free

Type: Website

Location: http://www.betterevaluation.org

Description: This website provides guidance and tools for every step in the evaluation process. The information and resources have been carefully vetted by an international collaboration of experienced evaluators. Membership (free) allows you to ask questions, contribute content, and connect with other members.

Suggestions: This site can be used as a complete reference guide to plan an evaluation, or as a reference site to search individual evaluation topics.

B. Building a strategic learning and evaluation system for your organization

Creator: Preskill and Mack

Year: 2013

Cost: Free

Type: PDF (32 pages)

Location: http://www.fsg.org/publications/building-strategic-learning-and-evaluation-system-your-organization

Description: Authored by leading evaluation thinkers and educators, this document is a call for organizations to take a strategic approach to utilizing evaluation resources and planning evaluation activities. Readers will learn to focus evaluation resources towards building a learning organization.

Suggestions: Designed for organizational leaders and managers, this resource may be useful to third sector organizations that hope to embed evaluation in their organizational culture.

C. Evaluation: A systematic approach

Creator: Rossi, Lipsey, and Freeman

Year: 2004

Cost:$106.00

Type: Book (480 pages)

Location: Sage Publications, http://www.sagepub.com/books/Book224290

Description: This book covers an overview of evaluation, tailoring evaluations, identifying issues and formulating questions, assessing the need for a program, expressing and assessing program theory, assessing and monitoring program process, measuring and monitoring program outcomes, assessing program impact, detecting, interpreting and analyzing program effects, measuring efficiency, and the social context of evaluation.

Suggestions: This text is a seminal resource on evaluation, but also heavy reading. It is best suited for those who want in depth information on evaluation design.

D. Evaluation essentials

Creator: Alkin

Year: 2010

Description: This book demystifies evaluation for both the novice and those with some evaluation experience. Each of the 26

Cost: -$48.00 (paperback or e-book), -$93.00 (hardcover)

Type: Book (260 pages)
Location: http://www.guilford.com/cgi-bin/cartscript.cgi?page=pr/alkin.htm

chapters addresses an essential evaluation planning question, such as: Who are evaluation stakeholders? What are the questions/ issues to be addressed? How are quantitative and qualitative data analyzed?

Suggestions: The book's layout and friendly writing style is particularly conducive to students or those new to evaluation. It can be read in its entirety or consulted chapter-by-chapter, depending on the user's immediate information needs.

E. Evaluation glossary

Creator: Community Solutions

Year: 2013

Cost: Free

Type: Mobile app

Location: http://communitysolutions.ca/web/evaluation-glossary

Description: This searchable database defines a wide range of evaluation terms.

Suggestions: Use this app to clarify confusing evaluation terminology.

F. Making evaluations matter: A practical guide for evaluators

Creator: Centre for Development Innovation

Year: 2011

Cost: Free

Type: PDF (120 pages)

Location: http://www.wageningenportals.nl/sites/default/files/resource/2011_guide_memguide.pdf

Description: In addition to covering basic evaluation planning steps, the guide covers how to make evaluations more useful, as well as how evaluations can empower stakeholders and contribute to changing mindsets.

Suggestions: Although designed for evaluators working in the international development sector, this resource can benefit anyone who needs guidance on using evaluation as a change facilitator.

G. Program evaluation and performance measurement: An introduction to practice

Creator: McDavid, Huse and Hawthorn

Year: 2013

Cost:$96.00

Type: Book (560 pages)

Location: Sage Publications, http://www.sagepub.com/books/Book234254

Other topics addressed: Performance measurement and monitoring.

Description: This book provides an accessible, practical introduction to program evaluation and performance measurement. The book uses extensive examples and also provides helpful checklists. Written by Canadians, it is one of the few general texts for evaluation with a Canadian context.

Suggestions: This book is helpful for those wanting a more in-depth understanding of how performance measurement and evaluation interact.

H. Program evaluation standards statements

Creator: Joint Committee on Standards for Educational Evaluation

Year: 2011

Cost: -$87.00 (full book), free (online overview)

Location: http://www.jcsee.org/program-evaluation-standards-statements

Other topics addressed: Evaluation planning.

Description: The Joint Committee on Standards for Educational Evaluation has developed a set of standards for evaluation that are endorsed by the Canadian Evaluation Society as a basic expectation for any evaluator. There are five main standards (each broken down into further detail): utility, feasibility, propriety, accuracy, and accountability.

Suggestions: A list of the program evaluation standards is available for free online. Those who are new to planning and conducting evaluation may wish to purchase the full book.

I. Program evaluation toolkit

Creator: Ontario Centre of Excellence for Child and Youth Mental Health

Year: 2013

Description: This resource was developed to strengthen child and youth mental health initiatives through promoting the use of evaluation and evidence-informed practice. The toolkit is divided into three main sections: planning, doing, and using

Cost: Free

Type: PDF (27 pages)

Location: http://www.excellenceforchildandyouth.ca/sites/default/files/docs/program-evaluation-toolkit.pdf

evaluation.

Each section is further broken down into steps and instructions for implementing an evaluation. The content is further explained via downloadable exercises, worksheets, examples, checklists and a glossary. The Centre provides other resources designed to help readers improve their understanding of program evaluation (available at www.centrelearning.ca).

Suggestions: The toolkit shares examples and templates geared to child and youth mental health initiatives. It can also be useful to those evaluating other types of programs involving children and youth.

J. Project evaluation guide for nonprofit organizations

Creator: Imagine Canada

Year: 2006

Cost: Free

Type: PDF (98 pages)

Location: http://sectorsource.ca/sites/default/files/resources/files/projectguide_final.pdf

Description: This is a generic guide to the evaluation planning process, divided into four modules: creating an evaluation plan; implementing your evaluation plan; analyzing and interpreting data; and communicating evaluation results. The guide includes planning templates, tip sheets, and additional reading materials in the appendices.

Suggestions: This guide is geared to the non-profit and volunteer sector, especially for those who have little to no evaluation experience.

K. RealWorld evaluation: Working under budget, time, data and political constraints

Creator: Bamburger, Rugh and Mabry

Year: 2012 2nd Edition

Cost: $92.19

Description: The authors recognize that evaluation planning always occurs in the midst of multiple constraints and provide guidance for how to plan a realistic evaluation under less than ideal conditions. The authors

Type: Book

Location: http://www.amazon.ca/RealWorld-Evaluation-Working-Budget-Political/dp/1412979625/ref=sr_1_1?ie=UTF8&qid=1394638681&sr=8-

draw upon their extensive and varied evaluation experience. Appendices offer helpful templates and tips.

Suggestions: This book is an excellent all-encompassing guide to evaluation. It is intended for those who have little to no prior evaluation experience.

L. W.K. Kellogg Foundation evaluation handbook

Creator: W.K. Kellogg Foundation

Year: 1998, updated 2004

Cost: Free

Type: PDF (120 pages)

Location: http://www.wkkf.org/resource-directory/resource/2010/w-k-kellogg-foundation-evaluation-handbook

Description: This handbook was developed for project directors and other not-for-profit/community organization staff who have evaluation responsibilities. It is intended to provide basic information that will allow staff to either independently conduct an evaluation or conduct an evaluation with the assistance of an external evaluator.

Suggestions: Beginners may wish to read the handbook from cover to cover. More experienced individuals may refer directly to relevant sections for ideas, strategies, or a refresher.

M. The evaluation center – Evaluation checklists

Creator: Western Michigan University

Year: Ongoing

Cost: Free

Type: Website

Location: http://www.wmich.edu/evaluation/checklists

Description: This is an easily navigable site providing guidance and tools for every step in the evaluation process. Membership (free) allows you to ask questions, contribute content, and connect with other members.

Suggestions: Checklists are useful to those who already understand evaluation and want to ensure they have addressed all relevant issues.

Logic models & Theories of Change

Logic models and theories of change explain the connections between program activities and intended outcomes (i.e., results). Developing a logic model and/or theory of change can help explain your program to internal and external stakeholders. This can contribute to improved program design, as well as provide a good starting point for developing indicators of success.

This section provides a selection of resources on how to interpret, develop, and use logic models and theories of change.

A. Logic model workbook

Creator: Innovation Network

Year: No date

Cost: Free

Type: PDF (25 pages)

Location:
http://www.innonet.org/client_docs/File/logic_model_workbook.pdf

Description: In easy to understand language, this workbook explains the purpose, use, and steps in developing a logic model. The workbook provides activities to develop logic models with stakeholders as well as useful logic model templates.

Suggestions: This resource teaches one logic model format. Readers should keep in mind that there are many other styles and read this workbook along with others.

B. W.K. Kellogg Foundation logic model development guide

Creator: W.K. Kellogg Foundation

Year: 1998, updated 2004

Cost: Free

Type: PDF (71 pages)

Location:
http://www.wkkf.org/resource-directory/resource/2006/02/wk-kellogg-foundation-logic-model-development-guide

Other topics addressed: Evaluation

Description: This resource provides a guided and in-depth approach to understanding, developing, and using logic models. Step-by-step guidelines, exercises, examples, and checklists provide hands-on learning activities for the serious student who wants an in-depth understanding of the logic model process and its use in evaluation planning.

Suggestions: This is the

planning template; theory of change; indicators.

companion document to the WK Kellogg Foundation publication *Evaluation Handbook.*

C. ESPA guide to working with theory of change for research projects

Creator: Ecosystem Services for Poverty Alleviation

Year: 2013

Cost: Free

Type: PDF (42 pages)

Location: http://www.espa.ac.uk/files/espa/ESPA-Theory-of-Change-Manual-FINAL.pdf

Other topics addressed: None.

Description: This resource provides an in-depth, step-by-step explanation for understanding and developing a program theory of change.

Suggestions: The resource is written from a research, rather than an evaluation perspective.

D. The logic model guidebook: Better strategies for great results

Creator: Knowlton and Phillips

Year: 2012, 2nd Edition

Cost: $70.95

Type: (170 pages)

Location: https://www.amazon.ca/Logic-Model-Guidebook-Wyatt-Knowlton/dp/1452216754/ref=dp_ob_image_bk

Description: Readers will develop a greater understanding of how to create, improve and use logic models, as well as learn more advanced logic model applications.

Suggestions: The beginner can focus on chapters 1-4 to learn the basics of logic model creation. Experienced logic model developers can focus on chapters 5-7.

E. Theory of change online

Creator: Center for Theory of Change

Year: Ongoing

Cost: Free

Description: This website provides several tools and resources for understanding and using theories of change. You can access theory of change software, resources, and a community of practice.

Type: Website

Location: http://www.theoryofchange.org/

Suggestions: This is a useful resource for those who want the latest guidance on theory of change issues.

Formulating evaluation questions

Every evaluation has a set of evaluation questions that are used to guide the overall process. These questions should request the information needed to meet the evaluation goals. For example, if your goal is to improve services to clients, one evaluation question might be "What opportunities are there for improvement?" Evaluation questions are not the questions you ask interview or survey respondents, but they will help you develop your data collection tools later on.

This section provides a selection of resources on how to develop and select evaluation questions.

A. Developing evaluation questions: Prioritize and eliminate questions

Creator: National Science Foundation

Year: 1997

Cost: Free

Type: Website

Location: http://www.nsf.gov/pubs/1997/nsf97153/chap_5.htm

Other topics addressed: None.

Description: There are usually more evaluation questions than time and resources can address. Completing this worksheet helps to determine which evaluation questions are high, medium, or low priority and which can be eliminated.

Suggestions: This is a useful tool for anyone who needs to prioritize evaluation questions.

B. Formulating useful evaluation questions

Creator: Rogers

Year: No date

Cost: Free

Description: This short video provides a snapshot of important factors to consider in formulating useful evaluation questions.

Suggestions: Patricia Rogers is an experienced evaluator with an

Type: Video (<4min)

Location: http://usaidlearninglab.org/content/evaluation-interest-group-patricia-rogers-formulating-useful-evaluation-questions

Other topics addressed: None.

international reputation. The video clip is an engaging way to learn from her experience.

C. Practical guide for engaging stakeholders in developing evaluation questions

Creator: Preskill and Jones

Year: 2009

Cost: Free

Type: PDF (48 pages)

Location: http://www.fsg.org/tools-and-resources/practical-guide-engaging-stakeholders-developing-evaluation-questions-0

Other topics addressed: Engaging stakeholders.

Description: This resource provides a step-by-step guide to engaging stakeholders in the development of evaluation questions. Worksheets that can be used with stakeholders to facilitate the process of question development are included.

Suggestions: This will be valuable to anyone looking for information on how to meaningfully engage stakeholders in the evaluation process.

Evaluation approaches

Evaluation approaches are beliefs about what a good evaluation should accomplish and how it should accomplish it. There are many different approaches, and many evaluations blend aspects of several together. This section provides a few resources on some of the major approaches including:

- **Actionable evaluation,** a relative newcomer on the evaluation scene that emphasizes practicality and utility.
- **Realist evaluation,** a theory-driven approach that recognizes the contextual nature of programs.
- **Empowerment evaluation,** which places emphasis on empowering clients and other stakeholders through capacity building and engagement in the evaluation process.
- **Participatory evaluation,** which emphasizes the importance of involving stakeholders in all stages of the evaluation process. Note that participatory evaluation is often used interchangeably with collaborative evaluation and/or as

an umbrella term that includes other approaches such as empowerment evaluation.

- **Appreciative inquiry,** an approach that focuses on what went right (as opposed to what went wrong) and how to build on past successes.
- **Utilization focused evaluation,** which emphasizes that evaluation findings and experiences should be put to use, and applied to real world programs. Resources that compare multiple evaluation approaches are also included.

A. Actionable evaluation basics: Getting succinct answers to the most important questions

Creator: Davidson, Real Evaluation Ltd.

Year: 2012

Cost: $6.49 (kindle), $17.99 (paperback)

Type: Mini-book

Location: http://www.realevaluation.com/read/minibooks/

Other topics addressed: Evaluation guides; Formulating evaluation questions.

Description: This mini-book provides an overview of actionable evaluation, an evaluation approach that emphasizes practicality and utility. The book describes six elements essential to actionable evaluation:

- A clear purpose for the evaluation.
- The right stakeholder engagement strategy.
- Important, big picture evaluation questions.
- Well-reasoned answers to the big picture questions.
- Succinct, straight to the point reporting.
- Answers and insights that are actionable.

Suggestions: Actionable evaluation, and this resource on it, may be helpful to those who wish to make evaluation more relevant and exciting to managers and staff. The mini-book is positioned in contrast to more ‘traditional’ evaluation approaches and therefore assumes some familiarity with evaluation.

B. A brief introduction to realist evaluation

Creator: Community Matters

Year: No date

Cost: Free

Description: Realist evaluation is a theory-driven approach that recognizes the contextual nature of programs and the factors influencing their success.

Type: Word (2 pages)

Location: : http://www.communitymatters.com.au/RE_Intro.doc

Therefore, evaluations should be tasked with finding out what works, for whom, and to understand the context in which particular programs do and do not work.

Suggestions: This short article provides a basic understanding of the tenets of a realist evaluation, which can be applied, to some extent, to all evaluations.

C. BetterEvaluation – Approaches

Creator: BetterEvaluation Consortium

Year: 2013

Cost: Free

Type: Website

Location: http://www.betterevaluation.org/approaches

Other topics addressed: Logic models and theories of change; formulating evaluation questions; types of evaluation; engaging stakeholders; steps in evaluation; data collection methods; analysis techniques and tools; reporting and knowledge mobilization; ethics; cultural competence.

Description: This site provides an overview and additional resources for 19 evaluation approaches, from appreciative inquiry to utilization-focused evaluation.

Suggestions: This is a great site to gain a rudimentary understanding of different evaluation approaches.

D. Evaluation for improvement: A seven-step empowerment evaluation approach

Creator: Cox, Keener, Woodard, Wandersman

Year: 2010

Cost: Free

Type: PDF (104 pages)

Location:

Description: Empowerment evaluation (EE) places an explicit emphasis on building the evaluation capacity of individuals and organizations to support the integration of evaluation into the organization's day-to-day management process. EE is sensitive to the concerns http://www.cdc.gov/violenceprevention/pdf/evaluation_improvement-a.pdf

Other topics addressed: None.

and the rights of traditionally vulnerable populations who are being 'evaluated'. This publication clearly outlines the seven steps of empowerment evaluation from the perspective of violence prevention organizations. The appendices provide useful worksheets and templates.

Suggestions: Although geared to violence prevention organizations, this resource is valuable to organizations who work with any marginalized group.

E. Participatory evaluation essentials

Creator: The Bruner Foundation

Year: 2010

Cost: Free

Type: PDF (136 pages)

Location: http://www.evaluationservices.co/uploads/Evaluation.Essentials.2010.pdf

Other topics addressed: None.

Description: Participatory evaluation places particular emphasis on the importance of involving all important stakeholders throughout the evaluation process. This guidebook explains the steps in planning and conducting an evaluation through a participatory lens.

Suggestions: This resource is particularly useful for non-profit organizations and their evaluation partners. The material is intended to be used sequentially; however, it may be useful to pull out specific sections or activities, depending on current need.

F. Reframing evaluation through appreciative inquiry

Creator: Preskill and Catsambas

Year: 2006

Cost: $67.00

Type: Book (192 pages)

Location: Sage Publications, http://www.sagepub.com/booksProdDesc.nav?prodId=Book227039

Other topics addressed: Focusing

Description: Many people fear evaluation because they assume, often rightly, that it will shine a light on what went wrong. Appreciative inquiry, by contrast, focuses on what went right and how to build on past success. This book provides a detailed explanation and illustrates how to apply Appreciative Inquiry principles in evaluation practice.

evaluation questions; designing and conducting interview and surveys; building evaluation capacity.

Suggestions: An appreciative inquiry approach to evaluation can be particularly useful in contexts where there is fear and mistrust of the evaluation process.

G. Utilization focused evaluation

Creator: Patton

Year: Original – 1978, 4th edition – 2008

Cost: $105.00

Type: Book (688 pages)

Location: Sage Publications, http://www.sagepub.com/books/Book229324

Other topics addressed: Evaluation guides/multi-topic, formulating evaluation questions, reporting and knowledge mobilization.

Description: Michael Patton's utilization-focused evaluation (UFE) is one of the most influential evaluation approaches. It facilitates a learning process in which intended users put evaluation to its intended use, applying evaluation findings and experiences. This seminal text explains the theory behind UFE as well as practical applications. The book contains many examples, anecdotes, and cartoons to engage different learning styles. It also includes follow-up exercises at the end of each chapter as well as utilization-focused evaluation checklist.

Suggestions: Publishers specify that the book is "an essential resource for students enrolled in Program Evaluation courses in a variety of disciplines…. Evaluation practitioners will also find this text invaluable." This book is a helpful resource for those who are already interested in UFE and wish for detailed information on the theory behind it as well as practical tips for how to implement this evaluation approach.

H. Utilization focused evaluation: A primer for evaluators

Creator: Dal Brodhead

Year: 2013

Cost: Free

Type: PDF (132 pages)

Location: http://evaluationinpractice.files.wordp

Description: This publication lays out the 12 steps of the Utilization Focused Evaluation (UFE) model in an accessible format. A UFE checklist and illustrative case studies are included. Whether or not an evaluation strictly follows the 12 step UFE process, it's valuable to be exposed ress.com/2013/04/ufeenglishprimer.pdf

Other topics addressed: None.

to the basic premise that evaluations should be designed to yield information that will be useful in making necessary and important decisions.

Suggestions: This resource is an easily accessible summary of Patton's UFE model. It may be helpful for those new to evaluation/utilization focused evaluation or those who want a reminder of the basic tenant of UFE. More experienced readers may wish to go directly to the original book, (see *Utilization focused evaluation* above).

Types of evaluation

Evaluation can be grouped into several key types:

- **Developmental evaluation,** a quick feedback cycle where evaluative thinking and strategies are used to improve an emerging program.
- **Formative evaluation,** used for ongoing learning and program improvement. This is often used as an umbrella term to cover implementation evaluation (seeing if the program has been implemented as planned) and process evaluation (exploring the process of program delivery). The terms may also be used interchangeably.
- **Summative evaluation,** used to understand if the program has achieved its goals. This is often used as an umbrella term to include outcome evaluation (exploring a program's direct effects), impact evaluation (exploring more widespread effects), and economic evaluation (exploring the value of a program's effects).

This section outlines resources that address each of these evaluation types. Note that many resources address formative and summative evaluation at the same time.

A. A guide to social return on investment

Creator: The SROI Network

Year: 2012

Cost: Free

Type: PDF (110)

Location:

Description: Social return on investment (SROI) is a form of economic evaluation which aims to capture all aspects of value delivered by a program or initiative, including social, environmental, and economic. This technique may be useful for those who wish http://socialvalueuk.org/publications/publications/doc_download/241-a-guide-to-social-return-on-investment-2012

Other topics addressed: Engaging stakeholders.

to show a more fulsome picture of their program or initiative's value. Non-profit organizations, social enterprises, private business, funders, and evaluation commissioners will all find useful information here.

Suggestions: It is recommended that those new to SROI read the guide in its entirety before beginning. Those who are more experienced can focus on specific chapters of interest.

B. Cost-effectiveness and cost-benefit analysis

Creator: Cellini and Kee

Year: 2010

Cost: Free

Type: PDF (38 pages)

Location: http://home.gwu.edu/~scellini/CelliniKee21.pdf

Other topics addressed: None.

Description: This paper provides an overview of cost-effectiveness analysis (i.e., a technique that relates the costs of a program to its key outcomes or benefits) and cost-benefit analysis (a technique that compares costs with the dollar value of the program's benefits). A ten-step process for conducting either type of analysis is outlined and illustrated by numerous practical examples.

Suggestions: This resource provides a good introduction for those wishing to learn more about economic evaluation.

C. A developmental evaluation primer

Creator: The J.W. McConnell Family Foundation

Year: 2008

Cost: Free

Type: PDF (38 pages)

Location: http://tamarackcommunity.ca/downlo

Description: Developmental evaluation (DE) is a rapid feedback cycle where evaluative thinking and strategies are used to improve an emerging program. This resource provides a basic introduction to the tenets of DE. It defines developmental evaluation in contrast to usual evaluation practice; addresses six DE myths; defines conditions conducive to DE; provides guidance in ads/vc/Developmental_Evaluation_Primer.pdf

Other topics addressed: None.

applying DE; and addresses issues and challenges of DE.

Suggestions: This resource addresses the theory behind developmental evaluation. Those wanting more hands on advice can consult the follow-up resource *DE 201: A Practitioner's Guide to Developmental Evaluation* *http://vibrantcanada.ca/files/development_evaluation_201_en.pdf*

D. Developmental evaluation

Creator: Patton

Year: 2006

Cost: $55.00 (paperback, e-Book), $110.00 (hardcover)

Type: Book (375 pages)

Location: http://www.guilford.com/cgi-bin/cartscript.cgi?page=pr/patton.htm&dir=research/res_eval

Other topics addressed: None.

Description: Developmental Evaluation offers a powerful approach to monitoring and supporting social innovations by working in partnership with program decision maker. It provides guidance for making evaluations useful, practical, and credible in support of social change. Written by the developer of developmental evaluation, this book shows how to conduct evaluations within a DE framework.

Suggestions: This is an entertaining read providing extensive examples, cartoons, and sidebars. It assumes only a very basic understanding of evaluation.

E. Different types of evaluation

Creator: The University of Arizona

Year: No date

Cost: Free

Type: Website

Location: https://extension.arizona.edu/evaluation/content/types-evaluation

Description: A useful chart summarizes the definition, uses, and examples of formative, summative, process, outcomes, and impact evaluation. A short (7 minute) video provides an overview of process and outcome evaluation.

Suggestions: This resource may be useful for beginners who are

Other topics addressed: Logic model builder; survey builder; interactive learning modules on the major steps in evaluation planning.

looking for clarification on the different types of evaluation.

F. Introduction to evaluation - Types of evaluation

Creator: Research Methods Knowledge Base

Year: No date

Cost: Free

Type: Website

Location: http://www.socialresearchmethods.net/kb/intreval.php

Other topics addressed: The planning-evaluation cycle; creating a positive organizational evaluation culture.

Description: This resource lists and defines several sub-types of formative and summative evaluation.

Suggestions: The list is found half-way down the page. It may be worthwhile to keep a hard copy of this list as a quick reminder of the different types of evaluation.

G. Types of evaluation – Evaluation toolbox

Creator: Community Sustainability Engagement

Year: No date

Cost: Free

Type: Website

Location: http://evaluationtoolbox.net.au/

Other topics addressed: The theories of change, monitoring and evaluation; data collection; reporting.

Description: This resource explains, in simple terms, the difference between formative and summative evaluation and when to use each.

Suggestions: This site contains numerous other useful evaluation resources, all written in plain language with the beginner in mind.

Performance measurement & monitoring

Performance measurement or performance monitoring (the terms are often used interchangeably) involves describing, counting, or otherwise tracking indicators of what your program does (activities), creates (outputs), and changes (outcomes). This information is used to identify success and areas of concern on an ongoing basis. It's also a great source of information for future evaluations.

This section provides a selection of resources on how to develop, implement, and effectively use a performance measurement/monitoring plan.

A. Effective use and misuse of performance measurement

Creator: Perrin

Year: 1998

Cost: Free with select memberships[1], otherwise $36.00

Type: Journal article

Source: American Journal of Evaluation, Vol.19 No.3

Location: http://aje.sagepub.com/content/19/3/367

Other topics addressed: None.

Description: This article:

- Provides background on the history of performance measurement;
- Cautions about the ways performance measurement is often misused and the negative implications this may have on an organization (e.g., rewarding/encouraging the wrong activities); and
- Identifies strategies for effective use of performance measurement.

The article concludes that performance measurement should not be a standalone activity, but rather integrated into a more comprehensive evaluation strategy.

Suggestions: This is an academic article that assumes that readers are familiar with background concepts and terminology. It is best suited for readers that have some experience conducting evaluation/performance measurement and who are looking for better ways to continue this work.

[1] Post-secondary student or staff, American Evaluation Association member, subscriber to OpenAthens, etc.

B. Handbook on planning, monitoring and evaluating for development results

Creator: United National Development Program

Year: 2009

Cost: PDF (232 pages)

Type: PDF (232 pages)

Location: http://web.undp.org/evaluation/handbook/documents/english/pme-handbook.pdf

Other topics addressed: Engaging stakeholders; data collection methods; analysis techniques and tools; reporting and knowledge mobilization.

Description: This detailed resource provides a result-based management approach to evaluating international poverty-reduction initiatives under the auspices of the United Nations Development Programs (UNDP).

Suggestions: Although geared to monitoring and evaluation within the context of the UNDP, the handbook provides a useful overview of monitoring and evaluation concepts and processes that can be used by any organization.

C. Performance measurement: A reference guide

Creator: Ontario Government

Year: 2005

Cost: Free

Type: PDF (67 pages)

Location: https://portal.publicpolicy.utoronto.ca/en/ContentMap/budgetingandfinancialmanagement/AdditionalResourcesFinancialManagement/Financial%20Mangement%20Documents/Performance%20Management/Performance%20Measurement%20Guide.pdf

Other topics addressed: Logic models, benchmarking.

Description: This publication situates performance measurement within the framework of results-based management and the context of government funded programs. It introduces a six-step process to developing performance measures.

Suggestions: This is a useful guide for anyone wanting a better understanding of performance management terminology, or wanting to understand the Ontario government’s perspective on performance measurement. Note that the link may ask for a username/password – this can be ignored to access the document.

D. Results based monitoring and evaluation toolkit

Creator: Spreckley

Year: 2009, 2nd edition

Cost: Free

Type: PDF (40 pages)

Location: http://www.mymande.org/sites/default/files/Results%20Based%20Monitoring%20Evaluation%20Toolkit.pdf

Other topics addressed: Indicators; formative and summative reporting formats.

Description: This toolkit explains: results-based monitoring and evaluation (M & E); the M & E cycle; and how to design and manage M & E systems. It is written in accessible language and the many coloured diagrams increase the resource's visual appeal.

Suggestions: This is a good introduction for those new to M & E.

Data collection methods

Data collection is any process where you gather the information needed to answer your evaluation questions. Data collection methods generally fall into two categories: quantitative (i.e., strategies for collecting numbers) and qualitative (i.e., strategies for collecting stories). Best practice is to use a combination of both.

This section provides resources on how to plan and use some common data collection methods. Resources to help determine which method is the right method and resources that address multiple methods are included in *Evaluation guides/multi-topic*.

A. Case studies

Creator: Colorado State University

Year: 1994-2012

Cost: Free

Type: Website

Location: http://writing.colostate.edu/guides/guide.cfm?guideid=60

Other topics addressed: Conducting qualitative and quantitative research; various other writing guides

Description: Provides a comprehensive overview of how to carry out and write up a case study. Types of case studies, design issues, participant selection, data collection and analysis, issues of validity and reliability, and the case study report are addressed, but not in great depth.

Suggestions: Hyperlinks make it easy to navigate among sections.

B. Collecting information using questionnaires: An overview

Creator: Ontario Centre of Excellence for Child and Youth Mental Health

Year: No date

Cost: Free

Type: PDF (17 pages)

Location: http://www.excellenceforchildandyouth.ca/sites/default/files/docs/minikit_questionnaires.pdf

Other topics addressed: None.

Description: This document provides a good overview of issues involved in using questionnaires as data collection tools, for example:

- When to use a questionnaire;
- Determining whether measures are appropriate;
- How to administer a questionnaire;
- Helpful tips;
- How to analyze the data; and
- Strengths and limitations.

Suggestions: This guide focuses on paper based questionnaires and does not address online surveys.

C. Conducting in-depth interviews: A guide for designing and conducting in-depth interviews for evaluation input

Creator: Pathfinder International

Year: 2006

Cost: Free

Type: PDF (16 pages)

Location: http://www.cpc.unc.edu/measure/training/materials/data-quality-portuguese/m_e_tool_series_indepth_interviews.pdf

Other topics addressed: None.

Description: This resource explains when it is appropriate to collect data using an in-depth interview, and the process for conducting the interview. Useful tips for developing an interview guide, collecting, analyzing, and reporting the findings of the interview are provided.

Suggestions: This is a generic guide useful to anyone wanting to learn in-depth interviewing techniques.

D. Data collection methods for evaluation: Document review

Creator: CDC Department of Health and Human Services – Evaluation Briefs

Year: 2009

Cost: Free

Description: Here you will find succinct answer to the following questions: What is a document review? When should you use document review for evaluation? and What are the advantages and disadvantages of document review?

Type: PDF (2 pages)

Location: : http://www.cdc.gov/healthyyouth/evaluation/pdf/brief18.pdf

Other topics addressed: None.

Suggestions: Check out some of the evaluation guides listed in *Evaluation guides/multi-topic* for further advice and templates to organize a document review.

E. Dominators, cynics, and wallflowers

Creator: Kahle

Year: 2007

Cost: $34.95 USD

Type: Book

Location: http://www.paramountbooks.com/dominators-cynics-wallflowers

Other topics addressed: None.

Description: For anyone who has struggled with facilitating focus group discussions in the face of 'difficult' participants, this book provides the tools to recognize and quickly address 'misbehaviours' that interfere with good focus group dynamics.

Suggestions: This guide does not deal with the usual mechanics of planning and conducting focus groups. However, it is important reading for anyone who wants to strengthen their focus group facilitation skills.

F. Focus group interviews: An overview

Creator: Ontario Centre of Excellence for Child and Youth Mental Health

Year: No date

Cost: Free

Type: PDF (12 pages)

Location: http://www.excellenceforchildandyouth.ca/sites/default/files/docs/minikit_focus_group_primer.pdf

Other topics addressed: None.

Description: This guide explains the strengths and weaknesses of focus groups, when to use them, as well as how to develop a focus group guide and conduct the focus group. Helpful tips for data analysis are provided.

Suggestions: It provides a good overview but does not cover any subject in depth.

G. Guide to focus groups

Creator: Ontario Women's Health

Description: This resource uses a women-

Network

Year: 2009

Cost: Free

Type: PDF (48 pages)

Location: http://owhn.on.ca/toolkit/GuidetoFocusGroups.pdf

Other topics addressed: None.

centered and inclusive approach to planning and conducting focus groups. It is a useful guide which addresses many of the practical issues such as logistics, budgets, sample scripts, and many practical tips.

Suggestions: Highly recommended for those planning women-centered focus groups.

H. Literature review – Quick guide

Creator: Region of Waterloo Public Health

Year: No date

Cost: Free

Type: PDF (5 pages)

Location: http://chd.region.waterloo.on.ca/en/researchResourcesPublications/resources/Link5.pdf

Other topics addressed: None.

Description: Explains how to write a literature review in five well-described steps. Two useful templates are included: a *literature review and screening tool*; and an *annotated bibliography template*.

Suggestions: This quick guide is a useful introduction to, or refresher on, literature review. More in depth information may be needed prior to conducting a literature review.

Analysis techniques & tools

Data falls into two main categories: quantitative (numbers) and qualitative (stories and descriptions). To analyze quantitative data, evaluators may look at frequencies, percentages, averages, or ranks. With qualitative data, evaluators look for themes, patterns, commonalities, differences, and examples. In both cases, the facts don't give the full picture – they need to be placed in context and interpreted.

The following section provides a selection of resources on how to analyze and interpret both quantitative and qualitative data.

A. Analyzing quantitative data

Creator: University of Wisconsin Extension

Description: Explains how to use basic descriptive statistics to analyze quantitative data such as: numerical counts / frequencies;

Year: 1997

Cost: Free

Type: PDF (6 pages)

Location: http://learningstore.uwex.edu/Assets/pdfs/G3658-06.pdf

Other topics addressed: None.

measures of central tendency (e.g. mean, mode, median), and measures of variability (e.g. range, standard deviation, and variance).

Suggestions: This resource provides a good introduction to descriptive statistics and is also a useful review for those who need to quick refresher.

B. 10 steps to make sense of answers to open-ended questions

Creator: University of Wisconsin Extension – PD&E

Year: 2002

Cost: Free

Type: PDF (2 pages)

Location: http://www.uwex.edu/ces/pdande/resources/pdf/Tipsheet20.pdf

Other topics addressed: None.

Description: Provides a concise overview of how to analyze open-ended (aka qualitative) survey or questionnaire responses.

Suggestions: This two-pager provides practical advice for interpreting open ended survey data. However, it is not applicable to analyzing more extensive qualitative data such as interviews or focus group data.

C. Qualitative data analysis – Quick guide

Creator: Region of Waterloo Public Health

Year: No date

Cost: Free

Type: PDF (5 pages)

Location: https://www.yumpu.com/en/document/view/17329392/qualitative-data-analysis-region-of-waterloo-public-health

Other topics addressed: None.

Description: Provides an easy-to-understand process for analyzing qualitative data, including reducing data, developing a code list, displaying the data, drawing and verifying conclusions, and deciding when to use qualitative data analysis software such as NVivo.

Suggestions: Although intended for internal use at a public health department, it is a useful and concise guide introducing anyone to the basics of qualitative data analysis.

D. Qualitative research & evaluation methods: Integrating Theory and Practice

Creator: Patton

Year: 2014, 4th edition

Cost: $89.76 USD

Type: Book (832 pages)

Location: http://www.amazon.com/Qualitative-Research-Evaluation-Methods-Integrating/dp/1412972124/ref=dp_ob_image_bk

Other topics addressed: Data collection; data analysis; reporting.

Description: This publication, now in its4th Edition, addresses conceptual issues in qualitative inquiry, qualitative designs, data collection, data analysis, interpretation, and reporting. The author has an accessible writing style and shares numerous case examples to illustrate how to apply the concepts.

Suggestions: Those who are looking for a more succinct guide to qualitative evaluation can look at resource C above.

Reporting & knowledge mobilization

Evaluation doesn't end when information is collected – it continues on to sharing your findings (reporting) and using those findings for positive change (knowledge mobilization). This section shares key resources on how to report on evaluation findings as well as mobilize the knowledge within them.

A. Developing an effective evaluation report

Creator: CDC National Center for Chronic Disease Prevention and Health Promotion

Year: 2013

Cost: Free

Type: PDF (84 pages)

Location: http://www.cdc.gov/eval/materials/Developing-An-Effective-Evaluation-Report_TAG508.pdf

Other topics addressed: None.

Description: This resource outlines a six-step process for writing a final evaluation report. The process involves stakeholders in interpreting the findings and drawing conclusions. Although more time-consuming, the process can increase buy-in and the likelihood that the evaluation findings will be understood and used.

Suggestions: This workbook applies and references the CDC *Framework for Program Evaluation in Public Health*. It is intended for use in cases where it is appropriate to involve stakeholders in a participatory evaluation report process.

B. Evaluation report checklist

Creator: Miron

Year: 2004

Cost: Free

Type: Online

Location: http://www.wmich.edu/sites/default/files/attachments/u350/2014/evaluation-reports.pdf

Other topics addressed: None.

Description: The *Evaluation Report Checklist* is a tool to guide a discussion between evaluators and their clients regarding the preferred content of an evaluation report. It can also be used to provide formative feedback to report writers. Evaluators can self- rate their own progress during the writing phase or they can use the checklist to identify weaknesses or areas that need to be addressed in their evaluation report.

Suggestions: This checklist focuses on the content of the evaluation report.

C. Evaluation report layout checklist

Creator: Evergreen

Year: 2013

Cost: Free

Type: PDF (3 pages)

Location: http://stephanieevergreen.com/wp-content/uploads/2013/02/ERLC.pdf

Other topics addressed: None.

Description: This checklist is meant to be used as a diagnostic tool to identify elements of evaluation reports that can be enhanced using graphic design best practices and/or the assistance of a graphic design expert.

Suggestions: This checklist focuses on the visual appeal of the evaluation report.

D. Presenting data effectively

Creator: Evergreen

Year: 2014

Cost: $45.00 USD

Type: Book (200 pages)

Description: *Presenting Data Effectively* explains the science of communication and how the brain takes in and retains information. This knowledge is transformed into practical guidelines for designing more effective reports, slideshows, posters, and

Location: http://www.sagepub.com/books/Book239285?course=Course1007&sortBy=defaultPu bDate%20desc&fs=1

Other topics addressed: None.

graphs. Watch the author's book trailer: http://stephanieevergreen.com/book/ or visit the advice page of her website http://stephanieevergreen.com/advice/ for more information:

Suggestions: Combining research with humor and plenty of examples, *Presenting Data Effectively* is a resource for anyone interested in using data to strengthen visual communications.

Working effectively with external evaluators

External evaluators can bring additional knowledge, experience, and time to a third sector organization. To make the most of this relationship, third sector organizations should have an understanding of what to expect, and how to effectively communicate with evaluation professionals. The following section provides resources that address: when to seek external expertise; how to contract professional evaluators; and how to effectively work with professional evaluators. A link to the Canadian Evaluation Society's directory of Ontario evaluators is also included as a starting point in seeking professionals.

A. CES Ontario consultant directory

Creator: Canadian Evaluation Society, Ontario Chapter

Year: N/A

Cost: Free

Type: Website

Location: https://evaluationcanada.ca/roster-credentialed-evaluators

Other topics addressed: None.

Description: An up-to-date searchable business directory of Ontario-based evaluation consultants. While it currently lists a relatively small number of evaluation consultants, this list is expected to grow.

Suggestions: A good starting place if you need to hire an evaluation consultant.

B. Extract value from consultants: How to hire, control and fire them

Creator: Perchthold and Sutton

Year: 2010

Cost: $33.71

Type: Book (224 pages)

Location: http://www.amazon.ca/Extract-Value-Consultants-Hire-Control/dp/1608320359

Other topics addressed: None.

Description: This book provides a step-by-step approach to searching for, interviewing, hiring, managing, and even firing consultants. It shares techniques to effectively manage the consultant/manager relationship and to get the best value from a paid consultant.

Suggestions: This book may be helpful to anyone who is considering working with professional consultants (including evaluators).

C. Evaluation guidebook for small agencies: Chapter 5

Creator: Treasury Board of Canada Secretariat

Year: 2004

Cost: Free

Type: PDF (150 pages)

Location: https://www.tbs-sct.gc.ca/cee/tools-outils/sma-pet/guidelines/guidebook-eng.pdf

Other topics addressed: Formulating evaluation question; types of evaluation; data collection; reporting.

Description: Chapter 5 provides guidance for small agencies who works with external evaluation consultants. It provides guidance on preparing an evaluation 'terms of reference', contracting options, selecting contractors, and best practices for managing evaluation consultants.

Suggestions: This resource is geared to small agencies that are required to meet the Treasury Board of Canada Evaluation Policy requirements. It may also be helpful to third sector organization who receive funding from the federal government.

D. Preparing to hire an evaluation professional

Creator: Canadian Centre for Financial Literacy

Year: Unknown

Cost: Free

Type: PDF (2 pages)

Location: http://prospercanada.org/getattachme

Description: This document is intended to help organizations that are thinking about hiring an evaluator. It provides tips for hiring, selection criteria, and suggested qualifications.

Suggestions: This document may be helpful to anyone who is considering nt/99b3a59a-2fa6-4085-a02b-de0f0daa93f3/Hiring-an-Evaluator.aspx

Other topics addressed: None.

working with professional evaluators.

E. When and how to use external evaluators

Creator: Rutnik and Campbell

Year: 2013

Cost: Free

Type: PDF (12 pages)

Location: http://c.ymcdn.com/sites/www.abagrantmakers.org/resource/resmgr/abag_publications/evaluationfinal.pdf

Other topics addressed: None.

Description: Written for non-evaluators planning to hire an evaluation consultant, the article briefly explains the stages of evaluation, when to evaluate, the process for selecting and engaging an evaluator, standard elements of an evaluation contract and tips for managing the evaluator.

Suggestions: This resource is geared to non-profit organizations and foundations intending to hire an external evaluator.

Ethical issues & cultural competence/sensitivity

Everyone involved in evaluation has a responsibility to ensure that the process is ethical. This means recognizing that participants may be vulnerable and adequately considering their welfare. It also means a responsibility to ensure that the evaluation is accurate and not misleading. While the principles of ethical evaluation do not change, the ways in which they are achieved may need to be adjusted based on cultural norms and expectations.

This section provides a selection of resources addressing ethical and cultural competence guidelines for evaluation. While each resource suggests a slightly different way of organizing and approaching evaluation ethics, the principles contained within them are consistent.

A. ARECCI ethics decision-support tools for projects

Creator: Alberta Innovates Health Solutions

Description: The *AREECI Ethics Guidelines for Quality Improvement and*

Year: 2008

Cost: Free

Type: PDF (16 pages)

Location: http://www.aihealthsolutions.ca/media/ARECCI-Ethics-Guidelines-FINALISBN-Aug-25-08.pdf

Other topics addressed: None.

Evaluation and the *ARECCI Ethics Screening Tool* are two decision support tools that assist the integration of appropriate ethical considerations to protect people involved in planning quality improvement, program evaluations, or research initiatives.

Suggestions: The ARECCI website also contains other useful documents concerning ethical issues in research and evaluation.

B. Ethical conduct for research involving humans (TCPS 2)

Creator: Tri-Council Policy

Year: 2010

Cost: Free

Type: PDF (216 pages)

Location: http://www.pre.ethics.gc.ca/pdf/eng/tcps2/TCPS_2_FINAL_Web.pdf

Other topics addressed: None.

Description: This is the definitive Canadian document addressing ethical issues involving human subjects participating in any form of research. It addresses: the consent process; fairness and equity; privacy and confidentiality; the ethics review process; conflicts of interest; and research involving the First Nations, Inuit, and Métis Peoples of Canada.

Suggestions: This is required reading for any agency receiving funding from the Canadian Institutes of Health Research, the National Sciences and Engineering Research Council of Canada or the Social Sciences and Humanities Research Council of Canada as they require compliance with TCPS2.

C. TCPS 2 CORE: Tutorial course on research ethics

Creator: Panel on Research Ethics

Year: 2010

Cost: Free

Type: Website

Location:

Description: This is an eight-module online tutorial course on research ethics. It focuses on understanding and complying with the Tri-Council Policy Statement (TCPS2) http://tcps2core.ca/welcome

Other topics addressed: None.

Suggestions: In order to access the learning modules, it is necessary to login and/or create your own account by clicking on the purple button on the right side of the 'Welcome' page. Those new to TCPS 2 are recommended to start with the CORE User Guide tutorial.

D. CES guidelines for ethical conduct

Creator: Canadian Evaluation Society

Year: No date

Cost: Free

Type: Website

Location: https://evaluationcanada.ca/ethics

Other topics addressed: None.

Description: These guidelines outline the Canadian Evaluation Society expectations for an ethical evaluation: competence, integrity and accountability. These three expectations are further broken down into 11 guidelines for ethical conduct.

Suggestions: The guidelines are relevant to anyone conducting evaluation activities.

E. Framework for the ethical conduct of public health initiatives

Creator: Public Health Ontario

Year: 2012

Cost: Free

Type: PDF (24 pages)

Location: http://www.publichealthontario.ca/en/eRepository/PHO%20%20Framework%20for%20Ethical%20Conduct%20of%20Public%20Health%20Initiatives%20April%202012.pdf

Other topics addressed: None.

Description: This resource addresses ethical issues from the perspective of the public health profession. It provides a concise interpretation of the Tri-council Policy Statement 2 (TCP2) through a public health lens and outlines an ethical framework to guide application of core principles to public health initiatives.

Suggestions: Those working in public health or community health initiatives would find this resource useful.

F. Statement on cultural competence in evaluation

Creator: American Evaluation

Description: The resource explains the

Association

Year: 2011

Cost: Free

Type: Website

Location: http://www.eval.org/p/cm/ld/fid=92

Other topics addressed: None.

concept of cultural competence and its importance in evaluation practice from both an ethical and a validity point of view. Essential practices for achieving cultural competence throughout all phases of evaluation practice are outlined.

Suggestions: Although developed from the American perspective, this document is a valuable resource for Canadians who aim to increase their ability to work respectfully and sensitively with those from different cultural backgrounds.

G. OCAP: Ownership, control, access and possession

Creator: National Aboriginal Health Organization

Year: 2007

Cost: Free

Type: PDF (23 pages)

Location: http://cahr.uvic.ca/nearbc/documents/2009/FNC-OCAP.pdf

Other topics addressed: None.

Description: This document outlines a code of ethics specific to working with First Nations communities in Canada. It explains the historical context which led to the creation of these guidelines.

Suggestions: Understanding and complying with the OCAP code of ethics may be a prerequisite for working with many First Nations communities. Other communities may appreciate application of some of the principles in OCAP and/or have their own guidelines.

Part 3:

Directory of evaluation training options

Evaluation Training Options

How to use this directory

A. Purpose

This Directory of Evaluation Training Options provides an overview of capacity building opportunities that may be of interest to third sector organizations. The majority of the opportunities are hosted in the Greater Toronto Area or online. Offerings from the American Evaluation Association (AEA) are also included as unique learning opportunities.

Additional evaluation training options are developed all the time, so this list may not capture one-time events or new opportunities established beyond March 2014.

Please note that the listing of a training opportunity does not imply endorsement by

UWTYR.

B. Structure

This directory is organized by type of evaluation training opportunity as follows:

- **Short courses and workshops –** Sessions lasting from one hour to one week, generally providing an introduction to evaluation or focused on a key evaluation topic.
- **Conferences –** Evaluation related conferences generally involve a combination of workshops, presentations, and networking opportunities. Locations vary from year to year.
- **Longer courses and post-secondary programs –** These courses are generally targeted towards those who will be conducting or managing evaluations. They generally involve a longer time commitment and may have formal pre- requisites.
- **Webinars –** Webinars are generally shorter (and often free) opportunities to focus on a key evaluation topic or issue.
- **Listservs and discussion groups –** These web-based resources provide an opportunity to connect and network with other individuals interested in evaluation. They are generally a good way to learn about new resources or one time training opportunities.

For each training opportunity, the following information is provided: the host organization, location, approximate cost (as of March, 2014), time commitment, website link for more information, and a brief description of the offering. Each listing also includes a table describing the target audience (as shown below). This table specifies whether the training would be most appropriate for beginner, intermediate, or advanced evaluators and whether it is specific to a sector (e.g., healthcare, poverty reduction, etc.) or applicable to any organization.

Level		Sector	
	Beginner		General/not sector specific
	Intermediate		Sector specific: N/A
	Advanced		

Short courses & workshops

A. CEC professional development workshop series in evaluation and applied research methods

Host organization: Claremont Evaluation Center (CEC), Claremont Graduate University

Location: Online (and California).

Cost:

- Professionals: $125.00per one full-day workshop.
- Students: $75.00per one full-day workshop.

Time commitment: 1 day per workshop, up to 6 days.

Website: http://www.cgu.edu/pages/465.asp#Daily

Target audience:

Level		Sector	
✓	Beginner	✓	General/not sector specific
✓	Intermediate		Sector specific: N/A
✓	Advanced		

Description: This workshop series provides practical and theoretical training in evaluation and applied research. Topics vary annually. In previous years, topics have included: evaluation basics, data collection and analysis techniques, cultural competence, evaluation approaches, etc.

B. CES-ON essential skills series

Host organization: Canadian Evaluation Society-Ontario Chapter (CES-ON) (content designed by the Canadian Evaluation Society)

Location: Toronto and other rotating locations throughout Ontario.

Cost:

- CES Member: $1,150.00 (plus fee/HST $1,349.70).
- Non-CES Member: $1,265.00 (plus fee/HST $1,483.68).
- Student CES Member: $575.00 (plus fee/HST $679.83).
- Student Non-Member: $635 (plus fee/HST $749.73).

Time commitment: 4 days, or 1 day per module.

Website: http://www.evaluationontario.ca/professional-development/upcoming-events/essential-skills-series/

Target audience:

Level		Sector	
✓	Beginner	✓	General/not sector specific
	Intermediate		Sector specific: N/A
	Advanced		

Description: The Essential Skills Series provides foundational learning in evaluation through four modules developed by the Canadian Evaluation Society: 1) understanding program evaluation; 2) building an evaluation framework; 3) improving program performance; and 4) evaluating for results. There are opportunities for group exercises and discussion. Course materials are included.

C. CES-ON survey design

Host organization: Canadian Evaluation Society-Ontario Chapter (CES-ON) (content designed by the Canadian Evaluation Society)

Location: Toronto and other rotating locations throughout Ontario.

Cost:

- CES Member: $600 (plus fee/HST $708.95).
- Non-Member:$660 (plus fee/HST $778.85).
- Student CES Member:$250 (plus fee/HST $298.49)*.
- Student Non-Member: $275 (plus fee/HST $328.24)*.
  **Student spaces are limited.*

Time commitment: 2 days.

Website: http://www.evaluationontario.ca/professional-development/upcoming-events/survey-design/

Target Audience:

Level		Sector	
	Beginner	✓	General/not sector specific
✓	Intermediate		Sector specific: N/A
	Advanced		

Description: This course builds attendees' capacity to plan a survey, choose an appropriate methodology, develop survey questions, and apply sampling procedures. An overview is also provided for how to analyze and use the results of survey research. Course materials are included.

D. CES-ON logic models

Host organization: Canadian Evaluation Society (CES)-Ontario Chapter

(content designed by the Canadian Evaluation Society)

Location: Toronto and other rotating locations throughout Ontario.

Cost: Check http://www.evaluationontario.ca for details.

Time commitment: 2 days

Website: http://www.evaluationontario.ca/professional-development/

Target audience:

Level		Sector	
	Beginner	✓	General/not sector specific
✓	Intermediate		Sector specific: N/A
	Advanced		

This workshop is designed to build capacity of participants to assess, develop, and utilize logic models for planning and evaluation. The workshop assumes some prior knowledge of evaluation and logic models. It includes a combination of lecture, discussion, and hands-on experience with a case study. Course materials are included.

E. CES-ON performance measurement for improved results

Host organization: Canadian Evaluation Society-Ontario Chapter (CES-ON) (course content designed and delivered by Dr. Paul Favaro)

Location: Toronto and other rotating locations throughout Ontario.

Cost: Check http://www.evaluationontario.ca for details.

Time commitment: 2 days.

Website: http://www.evaluationontario.ca/event/performance-measurement-for-improved-results/

Target audience:

Level		Sector	
	Beginner	✓	General/not sector specific
✓	Intermediate		Sector specific: N/A
	Advanced		

Description: This workshop is designed to build capacity of participants in the area of performance measurement. Content is currently under revision.

F. CES-ON qualitative methods

Host organization: Canadian Evaluation Society (CES), Ontario Chapter

(course content designed and delivered by Dr. Christine Frank)

Location: Toronto and other rotating locations throughout Ontario.

Cost: Check http://www.evaluationontario.ca for details.

Time commitment: 2 days.

Website: http://www.evaluationontario.ca/event/qualitative-methods-in-program-evaluation/

Level		Sector	
	Beginner	✓	General/not sector specific
✓	Intermediate		Sector specific: N/A
	Advanced		

Description: This workshop allows attendees to develop skills in applying qualitative methods to program evaluation. The workshop is designed for participants with at least a basic knowledge of program evaluation but little or no specific training in qualitative methods. Participants will engage in a series of case based exercises that include designing an evaluation, structuring interview guides, conducting an interview, viewing or participating in a focus group, analyzing data, and reporting.

G. Evaluating complexity workshops

Host organization: Evaluating Complex Interventions

Location: Toronto.

Cost: Free.

Time commitment: 1-3 hours.

Website: http://www.torontoevaluation.ca/

Target audience:

Level		Sector	
	Beginner	✓	General/not sector specific
✓	Intermediate		Sector specific: N/A
✓	Advanced		

Description: Each workshop covers a different aspect of evaluating complex systems and initiatives. Guest speakers are featured to share their experiences.

H. Innoweave developmental evaluation workshops & modules

Host organization: Innoweave

Location: Rotating locations throughout Canada (includes Toronto) and online.

Cost: Varies – Inquire at info@innoweave.ca.
Free – Online learning through the Innoweave website.

Time commitment: 1 day (workshop) & 2 hours (online learning).

Website: http://www.innoweave.ca/

Target audience:

Level		Sector	
✓	Beginner	✓	General/not sector specific
	Intermediate		Sector specific: N/A
	Advanced		

Description: The developmental evaluation (DE) workshop provides an in-depth introduction to DE and examples of how organizations can use it to improve their initiatives.

Online learning provides: Basic information about DE on the Innoweave website; self-assessment tool to determine whether DE is appropriate, given your context; and a 55 minute pre-recorded webinar covering basic DE concepts.

I. Innoweave collective impact workshops & modules

Host organization: Innoweave

Location: Rotating locations throughout Canada (includes Toronto) and online.

Cost: Inquire at info@innoweave.ca.

Time commitment: 1 day (per workshop) & 2 hours (online learning).

Website: http://innoweave.ca/en/modules/collective-impact/workshops

Target audience:

Level		Sector	
✓	Beginner	✓	General/not sector specific
	Intermediate		Sector specific: N/A
	Advanced		

Description: Innoweave has two workshops dedicated to Collective Impact: The first workshop, *The Collective Impact Opportunity*, helps groups of organizations that are interested in working together on a community issue to clarify the population level outcomes that they want to generate, explore the community system in which they operate, start to build a common agenda, and develop a short term plan including a community engagement strategy.

The second workshop, *Collective Impact: Conditions for Success*, helps teams of engaged leaders from 10-20 community organizations that have clarified their outcome goals work together to develop a more robust plan. They will reflect on emerging insights from their community engagement process, develop an initial theory of change for their collective impact initiative, determine the essential governance and backbone infrastructure required, and build a plan for their collective impact initiative.

Online learning provides: basic information about collective impact on the Innoweave website; a self-assessment tool to determine whether collective impact is appropriate, given your context; and a 45 minute pre-recorded webinar covering basic collective concepts.

J. PHO evaluating health promotion programs

Host organization: Public Health Ontario (PHO).

Location: Toronto.

Cost: Free.

Time commitment: ½ day.

Website: http://www.publichealthontario.ca/en/About/Departments/Pages/Skills-for-Health-Promotion-Workshop.aspx#.UvklPLSoRjs

Target audience:

Level		Sector	
✓	Beginner		General/not sector specific
	Intermediate	✓	Sector specific: Public Health
	Advanced		

Description: This course is one in a four part series on building capacity for health promotion. It will enable participants to be able contribute to the design of an evaluation based on an understanding of health promotion, the specific context, and stakeholder interests.

K. Tamarack/FSG champions for change

Host organization: Tamarack Institute & FSG

Location: Rotating locations throughout Canada (includes Toronto).

Cost: ~$950.00, with reduced rates if multiple people participate from the same organization.

Time commitment: 3 days.

Website: http://tamarackcommunity.ca/events.html#le

Target audience:

Level		Sector	
	Beginner	✓	General/not sector specific
	Intermediate		Sector specific: N/A
✓	Advanced		

Description: This workshop is designed specifically for the leaders of leadership roundtables, coordinating committees, or backbone organizations of mature collective impact initiatives. This learning opportunity is designed exclusively to develop their capacity as collaborative leaders.

L. Tamarack evaluating community impact

Host organization: Tamarack Institute

Location: Rotating locations throughout Canada (includes Toronto).

Cost: ~$850.00, with reduced rates if multiple people participate from the same organization, plus travel and accommodations.

Time commitment: 3 days.

Website: http://tamarackcommunity.ca/events.html#le

Target audience:

Level		Sector	
	Beginner		General/not sector specific
✓	Intermediate	✓	Sector specific: Community change initiatives
	Advanced		

Description: This interactive learning event designed to increase the capacity of leaders involved in community change efforts to better understand and evaluate the outcomes of their efforts.

M. Tamarack collective impact & community change

Host organization: Tamarack Institute

Location: Rotating locations throughout Canada (includes Toronto).

Cost: Check http://tamarackcommunity.ca/events.html#le for details.

Time commitment: 1 day.

Website: http://tamarackcommunity.ca/events.html#le

Target audience:

Level		Sector	
✓	Beginner	✓	General/not sector specific
✓	Intermediate		Sector specific: N/A
	Advanced		

Description: This workshop provides participants with an overview of collective impact and how this approach can enhance the impact of community change efforts. The facilitator will lead the group through the key questions collaborative groups need to consider before applying the collective impact framework, as well as share examples, tools, and resources participants can use to scale up their collaborative community change efforts.

Conferences

A. AEA national conference

Host organization: American Evaluation Association (AEA)

Location: Rotating locations throughout the United States.

Cost: Check http://http://www.eval.org/ for details.

Time commitment: 5-6 days.

Website: http://www.eval.org/

Target audience:

Level		Sector	
✓	Beginner	✓	General/not sector specific
✓	Intermediate	✓	Sector specific: Some sessions are sector specific
✓	Advanced		

Description: Evaluators and non-evaluators (of all levels of experience) attend in order to advance their knowledge and thinking of evaluation. The format typically involves daily keynote speakers, concurrent sessions (e.g., panels, think tanks, paper presentations), pre-conference workshops (additional fee), and opportunities to connect with others in the field.

This conference has a strong American focus, but there is significant representation from Canada and around the world. This conference is also larger than its Canadian counterpart which allows for more selection and variety.

B. CES national conference

Host organization: Canadian Evaluation Society (CES)

Location: Rotating locations throughout Canada.

Cost: Varies by year (~$250.00-$850.00), plus travel and accommodations. Additional fees for pre-conference workshops.

Time commitment: 3-4 days.

Website: http://www.evaluationcanada.ca/

Target audience:

Level		Sector	
✓	Beginner	✓	General/not sector specific
✓	Intermediate	✓	Sector specific: Some sessions are sector specific
✓	Advanced		

Description: Evaluators and non-evaluators (of all levels of experience) attend this conference in order to advance their knowledge and thinking of evaluation. The format typically involves daily keynote speakers, concurrent sessions (e.g., panels, think tanks, paper presentations), pre-conference workshops (additional fee), and opportunities to connect with others in the field.

Longer courses & post secondary programs

A. CHRN program evaluation online course

Host organization: Canadian Homelessness Research Network (CHRN)

Location: Online.

Cost: Inquire at thehub@edu.yorku.ca (3 modules).

Time commitment: 3 hours/week, 10 weeks.

Website: http://www.homelesshub.ca/research/program-evaluation/online-courses

Target audience:

Level		Sector	
✓	Beginner		General/not sector specific
	Intermediate	✓	Sector specific: Homelessness sector
	Advanced		

Description: This course aims to introduce homelessness sector professionals to the language, theory, and practice of program evaluation, and then to support participants through the process of conducting a program evaluation for their own agency. The course designers recommend that a small group of agency staff take the course together.

B. Ryerson program evaluation

Host organization: Ryerson University Chang School (Continuing Education)

Location: Toronto. One term per year offered online; one term per year offered as a hybrid (online plus one full Saturday per month in-person for 3 months).

Cost: $593.72.

Time commitment: On average, approximately 6 hours per week including virtual class time, reading, and completing assignments for the on-line portion.

Website: http://ce-online.ryerson.ca/ce/calendar/default.aspx?id=5&section=course&mode=course&ccode=CINP%20902

Target audience:

Level		Sector	
✓	Beginner		General/not sector specific
	Intermediate	✓	Sector specific: Non-profit sector
	Advanced		

Description: This course is one of eight required to complete a certificate in Nonprofit and Voluntary Sector Management (participants may choose to take just this course). It focuses on the development of knowledge and skills to plan and evaluate programs, and services in a variety of human service organizations. Topics include models of evaluation and strategies for assessing accountability.

C. UVIC graduate certificate and diploma in evaluation

Host organization: University of Victoria.

Location: Online.

Cost: $ 738.04 per course.

Time commitment: four courses (1 year) required for certificate; four courses and final project (two years) required for diploma.

Website: http://www.uvic.ca/hsd/publicadmin/graduate/future-students/grad-programs/evaluation-program/index.php

Target audience:

Level		Sector	
	Beginner	✓	General/not sector specific

	Intermediate		Sector specific: N/A
✓	Advanced		

Admission Requirements: Interested applicants must submit an application for admission and meet the following admission requirements:

- Undergraduate degree(or equivalent from another country) from an accredited and recognized institution;
- Grade point average of 5.0 (B) in the last two years (30 units) leading to the undergraduate degree; and
- Completed the equivalents of the following three courses:
  - Introduction to Research Methods
  - Introduction to Descriptive and Inferential Statistics
  - Introduction to Microeconomics

Description: The Graduate Certificate in Evaluation is made up of four courses and the Graduate Diploma consists of four courses and a research project. Students who have completed the four courses for the certificate program may receive a Graduate Certificate in Evaluation, or have their courses credited towards the diploma. The courses include readings, written assignments, and discussion groups on topics specific to the evaluation sector, or are focused on evaluation-related activities in the workplace of the students.

D. Waterloo master of health evaluation

Host organization: University of Waterloo

Location: Online.

Cost: $2,460.00/full-time term; $1,230.00/part-time term.

Time commitment: 9 courses and 1 420 hour practicum; takes 2-4 years depending on the number of courses taken per term.

Website: https://uwaterloo.ca/public-health-and-health-systems/future-graduate-students/professional-programs/master-health-evaluation

Target audience:

Level		Sector	
	Beginner		General/not sector specific
	Intermediate	✓	Sector specific: Public health
✓	Advanced		

Description: Participants gain the knowledge, skills and field experience needed for the evaluation of complex health challenges. Graduates will be adept at evaluative thinking, well versed in systems science, evaluation theory and methods, and with skills in communication and stakeholder engagement.

Webinars

A. AEA coffee break

Host organization: American Evaluation Association (AEA)

Location: Online.

Cost: Free (with AEA membership).

Time commitment: 20 minutes; calls occur weekly.

Website: http://comm.eval.org/coffee_break_webinars/coffeebreak/

Target audience:

Level		Sector	
✓	Beginner	✓	General/not sector specific
✓	Intermediate		Sector specific: N/A
✓	Advanced		

Description: Practical learning opportunities that offer tools and tips for evaluation. Topics change weekly.

B. AEA eStudy

Host organization: American Evaluation Association (AEA)

Location: Online

Cost: Varies (~$75-$200 depending on length of course)

Time commitment: 3-6 hours total (often broken up over a couple of sessions)

Website: http://comm.eval.org/coffee_break_webinars/eStudy/

Target audience:

Level		Sector	
✓	Beginner	✓	General/not sector specific
✓	Intermediate		Sector specific: N/A

✓	Advanced		

Description: Webinars cover a wide variety of topics of interest to evaluation including theories/models, analysis techniques, and tools.

C. CEC webinar series

Host organization: Claremont Evaluation Center (CEC), Claremont Graduate University

Location: Online.

Cost: Free.

Time commitment: 1.5h per webinar.

Website: http://www.cgu.edu/pages/10257.asp

Target audience:

Level		Sector	
	Beginner	✓	General/not sector specific
✓	Intermediate		Sector specific: N/A
✓	Advanced		

Description: Webinars cover a variety of topics, generally focusing on emerging evaluation issues/hot topics. The website does not target a specific audience but advertised topics appear to assume participants have some familiarity with evaluation.

D. CES webinars

Host organization: Canadian Evaluation Society (CES)

Location: Online.

Cost: Free for CES members.

Time commitment: 1 hour; webinars occur every 2-3 months.

Website: http://www.evaluationcanada.ca/site.cgi?s=3&ss=6&_lang=EN

Target audience:

Level		Sector	
✓	Beginner	✓	General/not sector specific
✓	Intermediate		Sector specific: N/A

✓	Advanced		

Description: Webinars cover a wide variety of topics of interest to evaluation including theories/models, analysis techniques, and tools.

E. Community solutions webinars

Host organization: Community Solutions

Location: Online.

Cost: Check http://communitysolutions.ca/ for details.

Time commitment: 3 hours (often broken up over a couple sessions).

Website: http://communitysolutions.ca/

Target audience:

Level		Sector	
✓	Beginner	✓	General/not sector specific
✓	Intermediate		Sector specific: N/A
	Advanced		

Description: A variety of topics are available including logic models, needs assessments, and alternative reporting techniques.

F. Intro to statistics: Making decisions based on data

Host organization: Udacity

Location: Online.

Cost: Free.

Time commitment: 6 hours per week, 2 months.

Website: https://www.udacity.com/course/st101

Target audience:

Level		Sector	
✓	Beginner	✓	General/not sector specific
	Intermediate		Sector specific: N/A
	Advanced		

Description: This course introduces basic methods of understanding data using statistics, including techniques for visualizing relationships in data and systematic techniques for understanding the relationships using mathematics.

G. My M&E e-learning programme in development evaluation

Host organization: Collaboration between UNICEF and IOCE under the EvalPartners initiative

Location: Online.

Cost: Free.

Time commitment: Each unit includes a lecture (approx. 30 min), 20-30 pages of reading, and a 10 question test. Units are available for 16 weeks.

Website: http://www.mymande.org/elearning

Target audience:

Level		Sector	
	Beginner	✓	General/not sector specific
✓	Intermediate		Sector specific: N/A
	Advanced		

Description: This e-learning program is composed of an introductory class, fixed courses, independent units and create your own course option. The courses are designed to improve competency in conducting evaluations, with a specific focus on development evaluation. Format includes online lectures, reading material, multiple-choice tests, and an optional discussion forum.

H. PHO evaluation at a glance

Host organization: Public Health

Ontario **Location:** Online.

Cost: Free.

Time commitment: 1 hour.

Website:
www.publichealthontario.ca/en/LearningAndDevelopment/Events/Pages/Evaluation-at-a-Glance-March2014.aspx

Target audience:

Level	Sector

✓	Beginner		General/not sector specific
	Intermediate	✓	Sector specific: Public health
	Advanced		

Description: This webinar provides an overview of 10 steps in developing and implementing an evaluation. This includes planning an evaluation, developing good evaluation questions and indicators, understanding and choosing the best methods for your evaluation, and how to make best use of evaluation results.

Listservs & discussion groups

A. AEA thought leaders

Host organization: American Evaluation Association (AEA)

Website: http://comm.eval.org/ThoughtLeaders/Home/

Description: An established evaluator or theorist contributes daily to an online dialogue around issues of importance to evaluation field. Must be an AEA member to join.

B. AEA 365

Host organization: American Evaluation Association (AEA)

Website: http://aea365.org/blog/

Description: Daily listserv that provides practical short evaluation tips and information. Must be an AEA member to join.

C. AEA Archives of EvalTalk

Host organization: American Evaluation Association (AEA)

Website: http://bama.ua.edu/archives/evaltalk.html

Description: An open group for general discussion of evaluation and associated issues sponsored by AEA.

D. AEA LinkedIn group

Host organization: American Evaluation Association (AEA)

Website: http://www.linkedin.com/groups/American-Evaluation-Association-1021707/about

Description: An open group available for anyone interested in discussing evaluation and associated issues of relevance to evaluators.

E. CES-ON LinkedIn group

Host organization: Canadian Evaluation Society, Ontario Chapter (CES-ON)

Website: http://www.linkedin.com/groups/Canadian-Evaluation-Society-Ontario-Chapter-3240212/about

Description: An open group available for anyone interested in discussing evaluation and associated issues, with a focus on Ontario.

F. Evaluation cafe meetups

Host organization: Evaluation Cafe

Website: http://www.meetup.com/Evaluation-Cafe-Toronto/

Description: The Evaluation Cafe is an in person informal networking and knowledge sharing event for professionals working in the field of program evaluation. It's a chance to meet new people, share ideas, and build a sense of community among evaluators in the Toronto area. Most events involve semi-structured learning opportunities (e.g., discussion on an evaluation-related topics), along with the opportunity to connect and network with others.

G. RealWorld evaluation LinkedIn group

Host organization: RealWorld Evaluation

Website: www.linkedin.com/groups/RealWorld-Evaluation-4211021

Description: An open group available for anyone who faces practical realities of implementing program evaluations.

H. Tamarack evaluation community of practice

Host organization: Tamarack Institute

Website: http://tamarackcommunity.ca/g2_CofP.html

Description: Discussion group featuring a guest speaker. Geared to evaluation practitioners who want to connect, share, and learn about evaluation approaches and tools. Discussions are held through one hour teleconferences, every two months.