

# OPEN Quick Guide: Evaluate – Are you making a difference? How do you know?

This quick guide is part of a suite of technical resources developed by OPEN on behalf of The Centre.

For more resources, go to [www.outcomes.org.au](http://www.outcomes.org.au)

# OPEN Quick Guide: Design Step 1

## **Evaluate provides an overview of the Evaluate process across the Outcomes Journey.**

Having designed your program and its outcomes, your outcome measurement (Evaluation) approach and collected data throughout implementation, you now need to evaluate your progress, outcomes and learning, and document, reflect and/or report to your team, clients and decision makers as required.

This Quick Guide will help you get started with analysing your data, identify and test your findings and finally prepare your evaluation report to meet the needs of your key audiences .

## What is the Evaluate process across the Outcome Journey?

Understanding the difference you are making for children and families and how you can improve will help you deliver the best outcomes for your clients. To do this, you need to have clearly defined your intended outcomes and collected data to understand how you are progressing towards them and how you can improve. The Outcomes Journey provides the tools to enable you to design, monitor and measure your outcomes.

The Evaluate process starts in the Design stage of the Outcome Journey. Through designing your program and outcomes and systematically collecting and using evidence as you implement your activities, you have the basis to Evaluate at any point throughout the program. The process of assessing the performance of your program in achieving its defined objectives is a key element of evaluation and distinguishes it from simple description or monitoring/measuring of activities, outputs and outcomes. The Evaluate process is therefore not merely descriptive but requires a judgement, supported by evidence.

**Evaluation** is commonly defined as the systematic process of making an objective judgement or assessment, informed by evidence, about the merit or worth of an activity, program or service. Monitoring is commonly understood to focus on activity, process and shorter-term outcomes to oversight activity, and might occur singularly or as part of an evaluation process. Evaluation will include a range of other types of data collection along with the periodic assessment and reporting of this judgement of merit or worth against predefined criteria of features of success.

Evaluation is a continuous improvement loop with key steps at each stage of your program lifecycle. If you have not as yet, designed your program, outcomes and their measurement (Design) or planned during implementation to collect data, monitor and reflect (Implement), go back to:

- **Quick Guides – Design Part 1 and 2** - in which you developed your program and its logic, and develop your approach to measuring your outcomes
- **Quick Guide – Implement** – where you build your understanding of implementation factors and steps to underpin successful implementation into practice.
- **Quick Guide – Evaluate** starts from the point of data analysis and reporting.

## Getting started - EVALUATE - Analyse, report and improve

Once data has been collected, you will need to analyse and interpret it, draw conclusions and identify next steps. Think through:

- How will data be analysed? How will different data be combined?
- Who will be responsible for analysis, findings, conclusions and recommendations?
- What reports need to be developed and for whom?
- Who needs to be involved in reflecting and testing findings? This is best done as a group exercise.
- How will you communicate and promote your findings to your broader audience?

**Tips:** Your evaluation questions help you group and build meaning from your data. Test findings and conclusions with your team, critical friends, key stakeholders and clients. In most cases it is important to document your findings and conclusions as this helps you communicate these more powerfully.

## Key tips for analysis and reporting

So, you are ready to analyse your data and report your findings:

- Ideally, you will have collected multiple data sets, both quantitative and qualitative. Analyse each data set separately, and group findings under the respective evaluation questions it responds to. Mostly questions will relate to:
  - What did we do and how well did we do it?
  - What difference did we make – did we deliver objectives and achieved expected outcomes?
  - What did we learn and what's next?
- Simple quantitative data analysis will focus on counts and proportions, while larger data sets may take more complex statistical analysis which may require an expert to help. Qualitative data analysis usually involves thematic analysis, identifying similarities and differences of views and assessing their frequency. Software packages are available to support thematic analysis, for small sample sizes a simple

excel spreadsheet can be used. Training is available through the Australian Evaluation Society. Contact OPEN to discuss your training needs.

- Analyse each source of data – what does it tell you? Group your findings from each data source under the question that it responds to. Consider any criteria/targets you established during the design phase.
- Consider how you need to design your evaluation report to meet the needs and communication preferences of your main audience. Your audience might be your team and immediate decision makers so reporting may be informal and a key input to a Review and Reflect tools. In addition or alternatively, you may need to communicate your findings more formally. Your information can be represented in a variety of styles from a one page Outcome or Results Chart, to a graphically designed communication document to a formal research-like report – or a combination of these.

## Further considerations to get you started

- **Remember to keep it simple** – Your intent should be to improve your evidence about the difference you are making. This does not have to be rocket science or require complex research design. Just get started. Systematically collecting very basic information about your delivery activities and their effects on clients can provide great insights alone and you can build from this point overtime.
- **Establish your 'evaluation' team and be clear about who will do what** – Make sure there is someone responsible for managing your evaluation process and that your managers and leaders understand and support your evaluation work. Experienced advice can help. Approach your organisation's research team, identify colleagues with experience in evaluation or contact the team at OPEN (Centre for Excellence in Child and Family Welfare) for free advice on the phone.
- **When considering who should do what in developing your evaluation, consider:**
  - What is the capability within your team or organisation in evaluation? Can it be grown? Building internal evaluation capability can be a great longer-term strategy for your program and organisation.
  - Once your program is already well designed and has it a basic measurement plan in place, you should build on this. Contact OPEN to explore how to do this as there are times when external specialist research expertise can further strengthen your evidence.
  - There is a time when a more formal and independent evaluation report is needed to attract future funding. The program team should lead the development of the evaluation scope and work closely with the external provider throughout for the best outcomes. Contact OPEN, we can provide

consultation services. Keep an eye out for OPEN training on how to commission external evaluations.

To get you started, find:

- **OPEN – Template - Outcome measurement planning template** – Provides a Cheat Sheet, Instructions and a Template to tailor your evaluation questions for your program and identify the data sources suitable to answer these questions. (forthcoming)
- **OPEN Evaluation Report Template.** This provides a basic structure for a traditionally focused evaluation report. Note the addition of an Executive Summary. This is a crucial shortened high level findings most (forthcoming)
- **OPEN Fact Sheet - Sharing evaluation findings** – Provides an overview of what to consider to ensure you get the best use out of your report. (forthcoming)

What are some other tools that could help?

Help with program logic and evaluation planning	
The Australian Institute of Family Studies practice resource <a href="https://aifs.gov.au/sites/default/files/publication-documents/2112_getting_the_most_out_of_program_logic_models_0.pdf">https://aifs.gov.au/sites/default/files/publication-documents/2112_getting_the_most_out_of_program_logic_models_0.pdf</a>	This resource provides detailed guidance on creating a Program Logic including a <a href="#">video</a> 'guided tour'
Social Policy Evaluation and Research Unit, NZ: Making Sense of Evaluation – A Handbook for everyone <a href="https://thehub.swa.govt.nz/resources/making-sense-of-evaluation-a-handbook-for-everyone">https://thehub.swa.govt.nz/resources/making-sense-of-evaluation-a-handbook-for-everyone</a>	Provides a plain English explanation with everyday examples of program logic development. A great place to start.
W. K. Kellogg Foundation – The Step by Step Guide to Evaluation <a href="https://www.betterevaluation.org/sites/default/files/WKKF_StepByStepGuideToEvaluation_smaller.pdf">https://www.betterevaluation.org/sites/default/files/WKKF_StepByStepGuideToEvaluation_smaller.pdf</a>	If you want more detail on evaluation planning, and the whole process this is for you.