Measuring Success 101

Brief #1: Measurement & Evaluation – An Introduction

Measuring Success 101 is an ongoing series on measurement and evaluation. Curious readers of this series include evaluators engaged in monitoring and assessing outcomes, funders committed to seeing funds wisely-spent, board members and the C-suite committed to mission and vision of the organization, and community seeking stories of success and impact.

This introductory brief takes a wide-angle look at measurement and evaluation and the Why's and How's of tracking the impact of your business, your organization and your programs on clients, customers and the community. It provides an overview for anyone new to this topic and a refresher for those already familiar with measurement and evaluation.

Every concept presented in this introductory brief lends itself to another conversation, more skill-building, more practice – all leading to a tighter design, more efficient implementation, and more valid results.

Managing and Measuring Performance

Organizations and businesses committed to measurement know the value of tracking programs and projects for their impact on customers and clients. Performance measurement provides essential information for making decisions that drive change.

Performance management is an ongoing process of planning, monitoring, evaluating, and decision-making. This continuous improvement system generates information that contributes to sound decisions that result in positive outcomes that lead to overall enhanced organizational performance.

Performance measurement, a key component of performance management, is involved with evaluating performance in order to establish its worth (or not). These evaluation findings, if and when considered, impact new thinking on changing, modifying or enhancing programs, products, and policies.

What is Evaluation?

Using goals or standards as a base, evaluation brings to light the value or benefit of a program, product or policy. Evaluation is a well-orchestrated process to measure success, a logical, systematized approach to effectively find out what happened and why.

> *Performance management is a continuous improvement system. Performance measurement is a key component of that system.*

Scriven (1991) in the *Evaluation Thesaurus* defines evaluation as "the process of determining the merit, worth, or value of something, or the product of that process" (p.139). In other words, evaluation is an investigation designed and planned to reveal the benefit or impact of a program, process, or product. Evaluation is systematic and mindful. If well planned, it provides key information that impacts organizational growth and positive change.

Data Collection is not the First Step. Evaluation starts with a good design and a clear plan. A well-designed evaluation generates meaningful findings that accurately reflect the outcomes and benefits of the programs.

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Evaluation is not just about collecting data, it's about collecting the right data. The right data are accurate, impartial and objective. The right data provide you with sound and valid information. You gather data, analyze it, and then reach conclusions. These conclusions are your findings, your best story.

I'm sure you've heard the adage, "Numbers talk." Yes, data do carry more weight than mere anecdotal stories. However, data reported *with* a complement of anecdotes will speak the loudest to your stakeholders.

First things first: Reflection

A complete measurement system integrates design, planning and implementation phases. Preemptive to design is reflection. Think about your organization. Start with the BIG PICTURE – the mission, vision and core values, and your strategic plan or business plan.

How does the program fit into this big picture? Best practice dictates that attention first be paid to this organizational/programmatic alignment in the program development or approval phase where objectives are identified and formulated so they are measurable. In a high-functioning organization, performance measurement seamlessly connects overarching enterprise goals with program and staff goals.

In this initial reflection phase and before starting the design and planning phases, focus on these key areas:

- **Context**: Align the program and evaluation with your Business or Strategic Plan. Ideally, at the onset of the program development

Data collection is not the first step of an evaluation. What is the difference between evaluation and simply collecting information?

phase, you deliberated on program objectives and their associated measurable outcomes and outputs to be measured in the program evaluation phase.

- **Past History**: Review existing and prior data sets and past findings. This may reveal patterns and new areas to study.
- **Stakeholders**: Identify key players, decision-makers, and consumers of the program outcomes and findings. These may include your Board, funders and sponsors, staff, current clients and prospective clients and 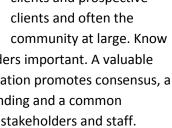often the community at large. Know what each considers important. A valuable and valued evaluation promotes consensus, a shared understanding and a common language among stakeholders and staff.
- **Purpose of Evaluation**: Why is the evaluation important? Who is requesting the evaluation? The Board? A Funder? The Board may be interested in information on how the organization compares to the competition or may seek information in the strategic planning process. Funders have reporting requirements.

An organization with an evaluation culture supports an ongoing query into performance. It supports evaluation design and implementation and promotes transparent accountability as reflected in a commitment to continuous improvement. Effective leaders value ongoing critical reflection on what is and is not working.

Basic Evaluation Model

Surf the Internet and you will discover a range of evaluation models. Take a closer look and you will begin to notice some combination of

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seven core components: Reflection, Design, Planning, Implementation, Analysis, Reporting, and Application of Findings.

Six-Step Evaluation Framework. The Centers for Disease Control and Prevention (CDC) developed a six-step evaluation model that has been adopted by many organizations (See CDC's Six-Step Evaluation Model .)

1. **Engage stakeholders**: Do not conduct the evaluation in a vacuum. Engage key stakeholders throughout the entire process so they support it and understand it.
2. **Describe the program**: Describe the program, including need, expected effects, activities, resources, and logic model. A Logic Model is a graphical representation of program resources, activities, outputs, outcomes, and associated output and outcome measures and indicators. [Theory of Change (i.e., Why and how your program works) also is implied within this step.]
3. **Focus the design**: Focus the evaluation design to address issues of greatest concern to stakeholders while using time and resources as efficiently as possible. Consider purpose, uses of the evaluation consumers of the evaluation, the evaluation questions, evaluation methods, and partnerships that may impact design and implementation. Evaluation questions, the most essential component of any evaluation, provide an anchor to insure targeted attention to the primary purpose for measuring outcomes and monitoring activities.

4. **Gather credible evidence**: Identify realistic and valid measures. Be pragmatic and precise in developing indicators (i.e., the right data) and a viable data collection method and system.
5. **Justify conclusions**: Know what the data do and do not show, including unintended consequences and whether the program is working the way it was intended to work. Connect the data back to the program logic and activities. Justify conclusions by linking them to the evidence gathered and judging them against agreed-upon values or standards set by the stakeholders or an external authority.
6. **Ensure use and share lessons learned**: Make Continuous Improvement a part of your culture. Use data to drive decisions about expanding, modifying or discontinuing programs.

Evaluation Planning and Implementation. Theory of change, the logic model, the evaluation framework (connects the evaluation questions with the logic model), and the evaluation plan (details the data collection plan, analysis and reporting activities) are all tools used in the design, planning and implementation of an evaluation.

An evaluation is time-consuming and resource-hungry. Once the design and plan are complete, do you have someone ready and able to direct the evaluation from implementation to data collection to analysis to reporting? When the evaluation is complete, how will you discern lessons learned and apply these in creating

> *Any evaluation model incorporates these seven core components:*
> - *Reflection*
> - *Design*
> - *Planning*
> - *Implementation*
> - *Analysis*
> - *Reporting*
> - *Application of Findings*

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more effective programming for your clients and to demonstrate efficient and best use of resources to your funders?

Start where you are relative to resources and experience. This may mean starting with a small-scale evaluation of one program and not trying to measure all your programs. Or you may focus first on one program for which a funder is requiring data. Create an evaluation design that aligns with your program goals and identifies all the right data (i.e., indicators).

Even if you have difficulty collecting data on all of the right data, best practice is to create a sound design. This design serves as your guide over time as you create data collection methods to capture all the data identified in the design.

Measurement is always possible. You can count (no pun intended) on hitting barriers and challenges. Be creative. Use secondary measures and samples if you are limited in resources and client access. This is not formal research. For example, if you cannot randomize the sample, still gather data. Document what you do and your rationale for designing and conducting the evaluation as you did. This documentation is your first defense if the findings fall short of your expectations or goals.

Conclusion

A well-designed evaluation (of a well-designed and fully implemented program) generates valid and reliable data that reflect projected change or growth in your clients and customers. Evaluation findings support an ongoing process of planning, measuring and improving program. A proactive organization drives excellence by measuring outcomes aligned to goals.

Resources

A Framework for Program Evaluation (CDC, 2012). http://www.cdc.gov/evaluation/framework/index.htm

Logic Model Development Guide. (W.K. Kellogg Foundation, 2004). http://www.wkkf.org/resource-directory/resource/2006/02/wk-kellogg-foundation-logic-model-development-guide

Scriven, M. (1991). *Evaluation Thesaurus (4th ed.)*. Newbury Park, CA: Sage.

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Measuring Success 101
Upcoming Topics

✓ *Aligning Strategic Goals with Program Outcomes and Evaluation*
✓ *Process vs. Outcome Evaluation*
✓ *Engaging your Board in Evaluation*
✓ *The Why and How of Your Program: An Intro to Theory of Change*
✓ *Mapping your Program: A Logic Model Primer*

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