Evaluation Tips

1. **Program interventions should result in change – for individuals, institutions, communities, etc. Developing an evaluation plan helps you to think about what type of changes you are expecting to occur, how you will document change, and which interventions can lead to these desired changes.**

   Example: Caregiver support group (intervention) will help reduce perceived burden and stress among informal caregivers of older adults. The change could, for example, be measured using the AMA's *Caregiver Self-Assessment Questionnaire*.

2. **Measuring change involves collecting consistent information from the start. Program and evaluation activities should begin simultaneously. Process documentation should include information on program development, so should begin before the intervention.**

   Example: To document change in client health status, ask clients the same series of questions before they begin receiving services (baseline) and after they have received services for some period of time (follow-up).

3. **Be realistic about data collection capabilities given staffing, financial resources, and access to partners'/other providers' data. A smaller amount of good data is better than a greater amount of incomplete or unreliable data.**

   Example: Demonstrating a global increase in service use requires access to data from all the service providers on the types of services and units of service each client uses. The type of information that can be collected might be dependent on other providers' capacity or willingness to share their client data with you.

4. **Don't compromise service delivery for data. Design the program and develop an evaluation plan to complement it.**

   Example: If staff members have to spend too much recording, organizing and reporting on evaluation data, they will not have time to implement the program. If clients feel too burdened by surveys, they will not want to come to your program. It is likely that the evaluation will require some extra data collection, but it may be minimized by strategic use of existing data and careful consideration of the value of each new form and survey question.

5. **Educate and train all staff about the program and evaluation protocols. Develop a training program and written protocols so that the evaluation process – from data collection through review of findings – is consistent.**

   Example: Multiple staff members in your organization are going to document clients' use of services. Be sure there is a common understanding (and written explanations) of how each service is defined, what constitutes a "unit" of service, and what questions clients should be asked. All staff should know how to complete forms and where to look/whom to ask if they have questions about gathering and coding information.

6. **Gather both quantitative and qualitative data. Decisions about the type of data should be driven by the evaluation questions and what you want to document.**

   Example: If you want to know whether people are using a new bus service, you will have to survey them or count ridership (quantitative). If you want to know how the bus service has affected their lives, you could survey them about their riding destinations, changes in level of socializing, and changes in feelings of isolation/connectedness to others. You could also solicit more open-ended descriptions of how improved mobility has affected their lives. Such qualitative or descriptive information is often compelling to funders and policy makers and may provide more clear explanations of the significance of increased mobility.

7. **Gathering information first-hand is best. Evaluators should attend project meetings and program activities, observe, take notes and talk to people – clients, staff, partners, stakeholders, and community members. The evaluator might include his/her observations as part of the findings, or collect other data that could become part of the evaluation.**

   Example: Evaluators have a different perspective because they are not involved in the day-to-day program work. If an evaluator is invited to a partnership meeting, he or she can make observations during the meeting— such as discerning attendees' attitudes, leadership styles, and decision-making processes— that people immersed in the project may not notice or may not be able to document in meeting minutes.

8. **Select evaluation questions/instruments carefully. Use validated questions whenever possible. Write your own questions if nothing appropriate is available. Be sure to find out if existing questions and survey instruments are in the public domain (free) or if there is a fee for using them. Also, some instruments have special instructions for scoring. Without the instructions, you won't be able to report on the results.**

Example: An organization that runs a Time Bank (a barter system that allows community residents to exchange services with one another) wanted to conduct a survey of their older members about how the Time Bank affected or changed their lives. The staff researched and found only one survey tool that had been used by another Time Bank, but decided the questions were not appropriate for the organization's clientele. Additional research uncovered a general, validated Volunteer Survey tool that they were able to adapt. They used an existing survey as a point of departure and customized it for their purposes.

9. **Use the data as you go along; don't save it for the end of the project. The people involved in the project are actually the ones who will find the data most useful. Create opportunities to share what you've learned so far and use this information to make mid-course corrections, if necessary.**

   Example: Evaluation data might help your staff understand differences between the people who continue to engage with your program and those who don't. You might discover in the course of data collection that people in certain neighborhoods cannot access your services. In response, you decide to develop a transportation service to increase accessibility for the clients in these neighborhoods. This mid-course change is possible because you examined the data collected as you went along and made changes to your work plan to maximize the potential for success.

10. **Data collection is a marketing opportunity and a way to engage stakeholders in your program.**

    Example: You want to make existing services more responsive to the needs of older adults. You also want providers to know about your program. Invite them to a presentation on your new program and, while they are there, have them take a brief survey, "to discover the challenges you, as providers, face in serving older adults in our community." This is a "win-win" situation: you engage the providers by having them participate in the survey, they learn about your program, and you learn about the barriers they face in serving older adults . Be sure to follow up with those who did not attend the presentation, in order to reach a wider audience and to collect more information to help guide your work.

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