Stage 2: Choosing Data-Gathering Methods for Your Project

<u>METHOD 1</u>: Surveys and Questionnaires

<u>METHOD 2</u>: Interviews

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<u>METHOD 6</u>: Pre-tests and Post-tests

<u>METHOD 7</u>: Using Community Measures

<u>METHOD 8</u>: Participatory and Creative Evaluation

This stage presents data collection methods that you may choose to use in your evaluation. The stage is offered as a resource to help you decide which methods to include in your evaluation plan. The stage may also be used as you conduct your evaluation to help you plan your data collection activities.

METHOD 1: Surveys and Questionnaires

Notes

Purposes

To understand when a survey would be useful for your evaluation.

To learn about the components of a good questionnaire/survey.

Outcome

To be able to develop a survey for your program.

Definitions

Survey: A method of gathering information from a group of individuals using identical procedures for each person. Surveys can be conducted in writing, over the telephone, face-to-face, or electronically.

Standardized surveys: Surveys that have been developed by survey analysts to address particular social issues, for example, smoking cessation, domestic violence awareness, drug use, or educational background. These surveys have been tested and the questions are usually coded for statistical analysis.

In-house surveys: Surveys developed by program staff and evaluators that are specific to the project being evaluated.

Closed-ended questions: Questions that give the respondent a choice of answers to select from.

Open-ended questions: Questions that allow the respondent to write an answer in her/his own words.

When is a survey useful?

- To compare different groups of individuals.
- To look at changes in a group over time using pre and post surveys.
- To get feedback on opinions and attitudes about a program from participants, staff, and other stakeholders.
- To learn about the knowledge, attitudes, characteristics, and behavior of program participants.
- To measure changes in the knowledge, attitudes, and behavior of program participants.
- To assess needs and satisfaction.
- To gather information about short, non-sensitive topics

Advantages and disadvantages of surveys

✎ Notes

Advantages:

- Can be used to obtain information from a large number of people.
- Closed-ended surveys provide quantitative data.
- Allow for comparisons with control groups.
- Can be quick and anonymous.
- Can be conducted in person, over the telephone, or by mail.

Disadvantages:

- Questions may be misunderstood by respondents.
- Responses to closed-ended questions provide limited depth.
- Quantitative analysis is less meaningful when the sample size is small.
- Survey use requires an understanding of survey design and statistics.

Steps for developing a survey for your program

- Review the evaluation plan.
- Determine whether the information you seek can be obtained from a survey.
- Determine the measures you want to evaluate using a survey.
- Determine the group you plan to survey and how you plan to conduct the survey – keep these in mind as you continue to develop the survey.
- Develop the survey based on the information you want to gather.
- Make sure the language you are using to ask each question is appropriate, and make sure the questions are clear and will provide the information you are seeking.
- Make sure the survey is readable, the order of the questions is logical, and the survey is not too long
- Pretest the survey with members of the group you plan to survey to make sure the content and language are relevant and appropriate. Then make necessary changes.
- Produce the final survey.
- Conduct the data collection.

Tips for using surveys in your evaluation

Notes

- Consult with an outside evaluator for assistance in developing questions for your survey.
- Make sure the survey questions are related to your program objectives.
- Make sure the survey is easy to complete.
- Avoid "leading" questions that encourage respondents to answer a certain way. For example:

Leading question:	*As a female employee, what kinds of discrimination have you experienced in your new job?*
Revised question:	*As a female employee, what has your current job experience been like?*
Or simply:	*What has your current job experience been like?*

- Avoid using biased language (positive or negative) in your questions. Use neutral language. For example:

Biased language:	*How has working in the trades improved the quality of your life?*
Neutral language:	*Has the quality of your life changed since you began working in the trades? If so, how?*

- Make sure each question is phrased as simply and directly as possible.
- Make sure the categories for possible answers appropriately answer the question and provide a full range of responses. Below are examples of inappropriate and appropriate categories for the following question:

  How useful were the Saturday field trips in learning about non-traditional trades in construction and manufacturing? Circle one of the following:

Strongly agree*---------*Agree*---------*Disagree*---------*Strongly disagree

(These categories are **inappropriate** because "agree" and "disagree" do not answer the question of usefulness.)

Extremely useful*----------*Very useful*----------*Useful*----------*Not Useful

(These categories are **inappropriate** because the number of possible positive and negative responses is not equal: there are three positive responses and only one negative response.)

Extremely useful*-------*Useful*-------*Not very useful*-------*Not useful at all

(These categories are **appropriate** because they answer the question, and the number of positive and negative responses is equal.)

METHOD 2: Interviews

✎ Notes

Purposes

To become familiar with different types of interviews.

To understand when interviews might be useful for your evaluation.

To identify the components of a good interview.

Outcome

To be able to plan, design, and conduct interviews for your evaluation.

Definitions

Structured interviews: Interviews that use predetermined categories of answers. (See "Method 1: Surveys and Questionnaires" in this Guide)

Open-ended (semi-structured) interviews: Broad questions are asked in a predetermined manner allowing for free-flowing conversation.

In-depth interviews (life history): Extensive, minimally structured personal narratives in which the interviewee recounts all or some aspect of her/his life.

Key informant interviews: Qualitative interviews conducted with program stakeholders who are selected based on their background and unique knowledge about the program.

Interview guide: A list of questions or topics to be asked or addressed during an interview.

When are interviews useful?

- To collect detailed information about participants' experiences and impressions about a program.
- To obtain feedback about program processes and multiple perspectives on outcomes from program stakeholders.
- To collect preliminary information before designing a survey.
- When you want explanation and follow-up to answers given on surveys.
- When you would like case study information.
- When program recommendations are sought.

When to use different types of interviews

Notes

Structured interviews:

- Suitable for short, non-sensitive topics.
- Can address program processes and subjective responses to program outcomes.
- May be useful for needs assessments and satisfaction surveys.

Open-ended and in-depth interviews:

- Used to gather detailed information, opinions and experiences, and to thoroughly document processes.
- Help to make connections between the program impact and other aspects of participants' lives.

Advantages and disadvantages of interviews

Advantages:

- With open-ended interviews, the interviewer may obtain rich details and new insights.
- Open-ended interviews allow the interviewer to ask the respondent for additional information.
- The respondent is able to raise the issues she or he feels are important and express ideas in her or his own words.

Disadvantages:

- Open-ended interviews may be expensive and time-consuming to conduct and transcribe.
- Open-ended interviews may require an outside evaluator for assistance with methods and analysis.
- Open-ended interviews may present challenges with privacy.

Key informant interviews

Key informant interviews allow the evaluator to select a diverse sample of program stakeholders based on the views they may hold or constituencies they may represent.

Key informant interviews are useful for purposefully selecting interviewees with a range of different perspectives.

Since interviewing all stakeholders is rarely feasible, key informant interviewing provides an alternative means of interviewing a purposeful or random sample of stakeholders.

Key informant interviews can be used to maximize the diversity of participants and limit the number of interviews conducted.

Steps for planning open-ended interviews for your evaluation

- Review the evaluation plan and research questions.
- Determine if interviews are the best way to obtain the information that you seek.
- Determine which group you would like to select interview participants from and how you plan to conduct the interviews.
- Develop an interview guide based on the information you will need to answer your research questions.
- Plan the order and content of the interview. Begin the interview with factual questions and follow with questions requiring opinions or judgments. Divide the interview guide into broad topics you plan to cover to ensure a logical flow for both interviewer and interviewee.
- Conduct the data collection.

Tips for using interviews in your evaluation

- If you are conducting open-ended interviews, make sure your questions elicit meaningful responses. For example, ask "how" and "why" questions rather than "yes or no" questions.
- Construct your sentences with neutral wording, free from bias or judgement, so as not to influence the responses of your interviewees.
- Use clear language and ideas to construct you questions.
- Pre-test the interview with potential interviewees to assess the interview length and whether the questions make sense.
- Have a protocol in your interviews for explaining the purpose of the interviews, what the interviews will be used for, and how confidentiality of participants will be maintained.
- Determine how the interviews will be recorded – whether it is necessary to tape record interviews, or if detailed, hand-written notes are sufficient.

To determine whether to conduct individual interviews or focus groups, refer to Appendix E.

Notes

METHOD 3: Focus Groups

✎ Notes

Purpose
To understand when focus groups are useful for an evaluation.

Outcome
To be able to design, plan, and conduct focus groups for your evaluation.

Definition
Focus Group: Open-ended interview with a group of similar respondents who engage in discussion about a specific topic under the direction of an interviewer. The interviewer is usually an outsider to the organization and may take a directive or unobtrusive role.

When are focus groups useful?

- When you want in-depth information about the experiences, attitudes, knowledge and opinions of program participants and other stakeholders.
- To gather information at various points in time: during program planning, for a needs assessment, and to evaluate processes and outcomes.
- To assess the satisfaction of program participants, determine whether participant expectations have been met, or obtain suggestions for improving a program.
- To learn about the needs, expectations, and knowledge of potential program participants in order to tailor a program before it is implemented.
- To elicit input from stakeholders, such as whether a program could benefit from modifications.
- To elicit public input about the effectiveness of and response to a media campaign.
- When group dynamics will help elicit information that might not be offered using other research methods.

Advantages and disadvantages of focus groups

Notes

Advantages:

- Like open-ended interviews, the participants are able to raise their own issues that they feel are important.
- Unlike one-on-one interviews, focus groups allow the interviewer to be less intrusive, and discussion can take its own direction – people are often more candid and spontaneous in a group discussion.
- Discussion among focus group participants can generate new information and raise new issues providing a range of responses with useful information.

Disadvantages:

- Focus groups should be run by a skilled facilitator and often by an outsider to the program.
- Since focus groups work best with 4 to 10 people, organizing groups and motivating people to attend may be difficult.
- The group dynamic may silence some, especially dissenting opinions.
- May be expensive and time-consuming to conduct and transcribe, and require either a trained note taker or transcription of tapes.
- Usually not quantitative, and usually not generalizable samples.

Steps for planning focus group interviews for your evaluation

- Review the evaluation plan and research questions.
- Determine whether focus groups are the best way to obtain the information you seek.
- Determine who will be the focus group facilitator (a member of the program team or an outside facilitator), and determine how responses will be recorded.
- Determine whom you would like to participate in the focus groups.
- Develop a focus group topic guide that lists the topics or questions you would like to address in focus groups. The topics you choose should be based on the information you want to learn about.
- Aim to have 6 to 10 participants for a good focus group discussion. Plan to invite a few more participants than you hope will participate, in case some are unable to come. Invite participants personally and follow up with a reminder call. You might offer lunch or refreshments.
- Conduct the focus group.

Tips for using focus groups in your evaluation

Notes

- Focus groups work well with participants who are homogeneous enough in background to talk comfortably with each other, but not necessarily homogeneous in their points of view or attitudes toward the topic.
- Participants in the focus group should be comfortable talking to each other and about the topic. However, it is better to bring together a group of strangers to a focus group than a group of friends. While friends may talk easily together, they may also share assumptions about the topic that will not enter the focus group discussion, and these assumptions may be an important part of what the focus group aims to reveal or learn about.
- Focus group participants are not required to agree or disagree about the topic they are discussing.
- A focus group should take place in a private, quiet room that will allow the participants to sit in a circle facing one another.
- Focus group sessions should last no longer than 1 1/2 to 2 hours.
- To record the focus group, a trained note taker may be present to document what is said and record other observations. Focus groups may also be audio or videotaped if feasible and with consent from participants. However, transcription can be time-consuming.
- Focus group participants must be encouraged to keep the responses made by other participants confidential.

Tips for Facilitating a Focus Group Discussion

- Begin by introducing yourself. Explain the purpose of the focus group and the value of the participants' views and opinions.
- Give each participant an opportunity to introduce herself to the group.
- Prepare questions and the order they are to be asked prior to the focus group, but allow flexibility in the discussion if participants are interested in a specific topic, or if the discussion does not follow the order of the questions.
- Do not rush the focus group, but if the discussion wanders move on to a different topic or bring the conversation back on track.
- Allow participants to do most of the talking, and also allow them time to gather their thoughts.
- Stress that everyone's view is important and there are no incorrect answers. Make sure everyone has an opportunity to speak.

(Adapted from Wenzel, S.A. and Brill, E. (1998). Mapping a Path for Evaluation: A Planning Guide, 2nd. Ed. Chicago, IL: Girl's Best Friend Foundation.

To decide whether to conduct focus groups or individual interviews, see Appendix E.

METHOD 4: Site Visits & Program Observation

✎ Notes

Purposes

To learn about the different types of program observation.

To understand when site visits and program observation might be useful for your evaluation.

Outcome

To be able to plan and conduct a site visit or observation for your evaluation.

Definitions

Site Visit: An opportunity for an evaluation consultant or other individual outside the organization to become more familiar with the program by traveling to a program site and observing program activities as they occur.

Observation: A qualitative method that provides descriptive information about what happens in a program event, including the environment or context, activities, processes, and discussions.

Staff Observation: Observations about the program recorded by staff through reports, record keeping, journal writing, or observational notes.

Participant Observation: Observations about the program reported by those who are served in the program.

Evaluator Observation: Observation of program activities and participant behavior, conducted by an outside evaluator.

When is program observation useful?

- To determine whether the program's processes are being implemented as intended.
- To assess whether certain program outcomes have been met.
- To obtain data about the behavior of individuals and groups.
- To learn about unanticipated effects of a program.
- When other types of data collection may be inappropriate or in conflict with the philosophies of the program.
- When participants are unwilling or unable to provide information using other methods.
- Repeated observations of a program can provide information about changes over time.

Advantages and disadvantages of observation

Notes

Advantages:

- Observers document program activities as they are happening, rather than relying on memories of the events.
- With staff observation, staff have easy access to and familiarity with the project and activities. (See also *Disadvantages.)*
- Participant observation may build the skill levels of participants, and allow participants to raise issues about the program. (*See also Stage 2, Method 8, "Participatory and Creative Evaluation)*
- Evaluator observation contributes information from a different perspective than that of program participants and staff.
- Observations often provide qualitative data, but can also provide quantitative data if checklists are used for recording relevant information.

Disadvantages:

- Staff observation may be limited in what it reveals. Because staff are familiar with and invested in the program, they may not notice thing that an outsider would notice.
- Staff members may not have time for evaluation activities.
- With participant observation, a skilled facilitator is needed to help participants present a critical evaluation.
- Confidentiality of participants must be considered.
- Evaluator observation may be intrusive and may influence the event being observed.
- Evaluator observation may be expensive and time consuming.

Steps for planning observation for your evaluation

- Review the evaluation plan and objectives to determine whether observations are the best way to obtain the information you seek.
- Determine what programs and activities will be observed, who will conduct the observations, when observations will take place, and how the observations will relate to the objectives.
- Establish a procedure or format that provides a consistent or structured way of recording observations (for example, a template or checklist). *See Appendix G for a sample observation template.*
- Plan to observe characteristics of program participants and staff, group interactions, nonverbal behavior, the physical environment, and program activities.

Tips for using observation in your evaluation

Notes

- With participant observation, confidentiality and anonymity of participants must be considered.
- To prevent feelings of discomfort by program participants and staff, the leader of a program should not act as the observer.
- Covert observation is often unethical, and extreme consideration should be taken if observation is covert.
- Observers should be aware of their own personal expectations, values, and interests in the situation they are observing.
- The presence of an outside observer can influence the behaviors of program staff and participants. To minimize such influence, it may be helpful for the observer to spend some time in the program setting prior to conducting formal observation.
- Notes taken during observation should be as descriptive as possible, and should include people's behaviors and words, the physical environment, and the evaluator's own behaviors and impressions.
- Observers should take note of what <u>is not</u> happening as well as what <u>is</u> happening. For instance, if you are observing a training workshop, the observer should note trainees who do <u>not</u> actively participate as well as those who do.

METHOD 5: Reviewing Agency Records

✎ Notes

Purpose
To understand the types of information that can be obtained for your evaluation by reviewing agency records.

Outcome
To be able to conduct a review of agency records for your evaluation.

Definitions
Agency records: Organizational documents relevant to your program, such as: work plans, meeting minutes, grant proposals, annual reports, mission statements, attendance sheets, budget information, correspondence, newsletters.

Existing records: Information routinely collected by your program, not specifically for the evaluation.

Created records: Information collected about the program specifically for the evaluation.

When is reviewing agency records useful?

- Agency records may provide information about programming decisions, program activities, changes in program policies, changes within the organization relevant to the program, and reactions of stakeholders to program events.
- Agency records may provide information about the number of program participants and characteristics and behaviors of the participants.
- Agency records may provide information about the history and context of the program and about internal and external factors that have affected the program and program activities.
- Agency records may be used to examine changes in the program over time.

Advantages and disadvantages of reviewing agency records

Notes

Advantages:

- A review of agency records is typically inexpensive because the documents already exist and a minimum number of staff members/evaluators are required to collect data.
- Not obtrusive to the program – program activities are not interrupted.

Disadvantages:

- Agency records may not be accessible to outside evaluators.
- The information contained in existing records may be inaccurate or incomplete.
- Information collected over time may be inconsistent.
- Reviewing agency records may be time-consuming.
- When reviewing existing records, data is limited to what already exists.

Steps for planning to review agency records for your evaluation

- Review your objectives to determine whether reviewing agency records is an appropriate method of data collection.
- Determine which objectives you will address through a review of agency records.
- Decide which documents are appropriate for answering your research questions. (What documents do you need to review and over what period of time?)
- Gather and organize the documents you plan to review.
- Determine specifically what type of information you are seeking from the documents, and how you will track the information you find. Create a system to code or organize the data you collect.
- Conduct the data collection.

Tips for reviewing agency records

Notes

- As you gather the documents you plan to review, consult with staff members who are familiar with the records to learn about possible problems with the records or any changes in the way information was recorded over a period of time.
- Determine how to handle problems that may arise during the data collection (such as inconsistencies in the data or missing data).
- If possible, verify the data with staff member(s) who initially recorded or collected them.
- Take time to understand the limitations of your data. Note how any problems with the data may affect your findings.
- Address issues of confidentiality of information:
    - Ensure that only the program evaluators have access to sensitive program information that may be contained in agency records.
    - Do not discuss sensitive information contained in agency records with those who are not involved in the evaluation.
    - Do not use personal identifiers as you collect data from agency records. Develop a code to identify individuals, and keep the code numbers and names in a separate location.
    - Report information in a way that does not permit identification of program participants or staff.

To learn more about confidentiality, see Appendix D.

METHOD 6: Pre-tests and Post-tests

✎ Notes

🛠 Purposes

To understand the type of information that can be obtained from performance tests.

To understand when pre-tests and post-tests are useful to your evaluation.

🛠 Outcome

To be able to select or develop appropriate pre-tests and post-tests to evaluate your program's objectives.

🛠 Definitions

<u>Performance tests/Achievement tests</u>: Evaluation instruments that are designed to measure knowledge, skills, or attitudes that program participants possess about a particular topic. Performance tests are often referred to as pre-tests and post-tests (*see definitions below*).

<u>Baseline data</u>: Information collected before the program begins, which can compared with similar information collected during or after the program.

<u>Pre-test</u>: A test administered before a program begins to measure program participants' knowledge, attitudes, and/or skills in an area. Pre-tests are used to collect baseline data.

<u>Post-test</u>: A test administered at the end of a program to measure the program participants' knowledge and/or skills in an area. It can be compared with results of a test administered at the beginning of a program to assess change as a result of the program.

<u>Identification codes (naming conventions)</u>: Codes used as an alternative to informants' names to ensure anonymity when performance tests are used. A naming convention assigns each informant a distinct code that allows evaluators to compare changes in individuals' test results without knowing their names. (*See Appendix F for more on identification codes.)*

☞ Remember

Performance tests are appropriate for evaluating your program's <u>outcome</u> objectives.

When are performance tests useful?

Notes

- Performance tests may be used when your program objectives aim to increase knowledge or skills in a particular area by a specific degree.
- Performance tests may be used to measure changes in participants' knowledge, skills, and behavior as a result of your program.
- Depending on program needs, performance tests may be used to measure internal changes in participants in areas such as beliefs or motivation.
- A post-test may be used without a pre-test if a specific amount of knowledge needs to be guaranteed at the end of the program, but measuring an increase in knowledge is not necessary.

Advantages and disadvantages of pre-tests and post-tests

Advantages:

- Allow you to look at the changes of a group over time.
- Can be used to compare those in your program with a comparison group.
- Provide quantitative data, which administrators and funders may prefer.
- Many test instruments already exist and do not need to be developed by program staff or evaluators.

Disadvantages:

- Developing a pre-test and post-test suitable for a specific population requires skill and can be time-consuming and expensive.
- Test results can be influenced by differences in individual participation in activities throughout the program.
- Available tests may not be appropriate for the population served by your program.
- Pre-developed instruments needed for testing may not be financially feasible for your program.
- The test that is used must exactly match what is covered in your program.
- A large sample size is typically needed to perform statistical analysis.
- Test scores may be influenced by factors such as literacy levels, language fluency, and negative attitudes towards school or tests.
- Like surveys, responses to performance tests provide limited depth.
- Knowledge of statistical procedures is required for assessing change.

Steps for planning to use performance tests for your evaluation

Notes

- Review your objectives to determine which might possibly be measured by performance tests. *Below is an example of an objective that could by evaluated using performance tests:*

  60% of women completing the training program during program year 2002 will have acquired the skills needed to pass the carpenter's entrance exam.

- Determine exactly what types of knowledge, attitudes, and/or skills will be measured quantitatively by your test, and how they will be measured.
- If comparisons will be made before and after the program, determine how the comparisons will be made: in aggregate or individually.
  - When comparisons are made in aggregate, the average pre-test measurements of the entire group are compared with the average post-test measurements.
  - When comparisons are made individually, pre-test measurements are compared to post-test measurements for each participant. When individual comparisons are made, identification codes are used to ensure participant confidentiality. Identification codes also allow evaluators to match each individual's pre-test and post-test scores. Identification codes are constructed using participants' initials, birth dates, and other letters and numbers provided by participants. When choosing a code, it is important to select one that will not change over the duration of the program. It is also important to make sure each participant will be different and truly anonymous to the program staff. *To learn more about identification codes, see Appendix F.*
- Determine who will be tested and when.
- Find or develop a test that will measure the knowledge and/or skills that you want to assess.
- Make sure the test measures the exact content that is covered in your program.
- Administer the test to program participants before and after the program.

✍ Tips for using performance tests in your evaluation

✎ Notes

- Consider using performance tests in consultation with an experienced researcher to ensure that your test measures what you intend it to measure and to assist with statistical aspects of using performance tests and making comparisons.
- Questions on tests can be written in various forms, for example, true/false, multiple choice, or open-ended.
- Make sure test items are based on significant concepts from your program.
- Program staff must agree on the correct answers to the questions.
- Make sure your test questions are worded clearly and will not be confusing.
- Do not use performance tests if they will intimidate program participants. Reassure participants that they are not being graded or judged, that pre-tests and post-tests are a means of collecting data that will be combined with everyone in the group.
- Use performance tests only when the program has been in place long enough to have an effect on test scores.
- Make sure your instrument is appropriate by administering it to a small group of program participants before using it with the whole group you intend to test.
- Before using performance tests, make sure the instrument you have chosen will effectively measure change.

METHOD 7: Using Community Measures

✎ Notes

Purposes

To learn about the types of information that can be obtained using data collected about the communities served by your program.

To understand when community measures are useful to your evaluation.

Outcome

To be able to plan the use of community measures in your evaluation.

Definition

Community measures: Documents or reports collected by groups other than your organization that contain information and statistics related to your program objectives and the population served by your program. Community measures may be obtained from government departments at the federal, state, and local levels, as well as from private agencies such as community organizations, research institutes, and university archives.

When are community measures useful?

- Community measures may be used to assess the needs of communities or groups served by CWIT.
- If your program is intended to have an impact at the city, county, or state level, community measures can help establish realistic objectives for the program's broader impact. Comparison of community data before and after program implementation can help determine whether your program had the intended impact.
- Community measures may be used to identify external factors that may challenge or guide a program. For demonstration or pilot projects that are intended for replication, community measures may contribute to an understanding of the target population served by the program.
- Community data may help you understand the relevance and impact of local, state, or federal policies on your programs.

Advantages and disadvantages of using community measures

✎ Notes

Advantages:

- Place the program in the larger context of the community.
- Help in understanding the broader impact of the program beyond the organization.
- Some types of data are collected regularly and are publicly available.

Disadvantages:

- Data may be difficult or time-consuming to locate.
- Usually limited to quantitative data.
- Data are limited to what has already been collected and may not be relevant to your program.
- Making a connection between your program and changes in the community may be difficult.

Examples of community measures used by CWIT for program and policy development

- Numbers of clients placed into non-traditional jobs and training programs by local DHS offices, broken down by gender and age.
- State and federal information on the gender wage gap across employment sectors and specifically in non-traditional occupations.
- Enrollment information at job training programs which are partners or potential partners, broken down by gender.
- Student enrollment statistics in vocational career tracks at CPS academies, vocational programs, and at city and community colleges.
- Data on hiring, retention, and promotion of women compared to men from local (Chicago and suburban) manufacturing and construction companies.
- Data on membership breakdown by sex in state locals of construction and manufacturing unions.

Steps for planning to use community measures in your evaluation

- Review your objectives and research questions to determine whether community measures are useful to your evaluation.
- Determine the type of data about the community that would be useful to your evaluation.
- Locate data samples to find out what information is and is not available, if the information is will be useful for your evaluation, and if additional information is needed.
- Conduct data collection.

Tips for using community measures in your evaluation

- Community data are available from a variety of sources, such as the agency that collected the data, the World Wide Web, and libraries that house government documents. (Many university libraries and large public libraries possess government documents that can be accessed by the public.)
- Data collected by the U.S. government – such as census data, and data collected by government agencies at the federal, state, and local levels – are free to the public.
- Data collected over long time periods must be used to identify trends. If you intend to use data collected on a regular basis to assess the impact of a policy initiative, keep in mind that short-term changes in the data may not be related to the policy. Data must be examined over an extended period of time. (The data must be collected the exact same way at each data collection point over the period being examined.)
- Pay attention to the time period and geographic area described by the data you collect.
- Interpreting data that was not collected specifically for your project requires caution because you probably had little control over data collection. There may be factors influencing the data or collection of data that are outside of your control.

Notes

METHOD 8: Participatory and Creative Evaluation

✎ Notes

Purposes

To learn how “participatory evaluation and “creative” evaluation differ from conventional evaluation approaches.

To understand how creative and participatory evaluation approaches relate to the feminist principles of CWIT.

To learn to determine when and how creative or participatory methods are appropriate for and will enhance your evaluation.

Outcome

To incorporate one creative and one participatory evaluation activity into your program evaluation plan.

Definitions

Participatory Evaluation: An approach to evaluation in which program staff and program participants collaborate in some or all facets of the evaluation process.

Creative Evaluation: Evaluation in which unconventional or innovative approaches are used to design the evaluation, collect and analyze the data, and/or present the findings in a report.

Empowerment Evaluation: Evaluation in which program participants develop their research skills and conduct an evaluation of their own program. Through empowerment evaluation, participants are able to provide input into the program, gain a critical and engaged view of the program, and advocate for the program or implement program change.

Creativity, Participation, and Feminist Praxis

Creative and participatory methods, unlike other methods presented in this section, are based on distinct philosophies about evaluation. The two approaches are presented separately, with a preliminary discussion about the premises behind each approach to evaluation.

While creative and participatory evaluation methods are challenging to incorporate because they are unconventional, they can contribute to your evaluation in ways that are consistent with the feminist principles and strategies guiding CWIT. Creative and participatory methods:

- Increase women’s and girls’ critical participation in programs that serve their needs;
- Focus the evaluation design and data collection practices around the knowledge, skills, and perspectives of participating women or girls;
- Bring to light women’s and girls’ experiences of and insights about the trades program or policy being evaluated;
- Cultivate dialogue and mutual respect between program staff and participants.

Creative Evaluation

Creative evaluation refers to the disposition to adapt some or all parts of your evaluation to accommodate unusual program situations or resources, enhance the ability of stakeholders to participate in the evaluation, and/or reach specific audiences with your report. Creative evaluation is based on the following principles:

- There is no one way to conduct an evaluation; rather evaluation should accommodate the program and its participants.
- Conventional evaluation methods do not always produce the most useful data, especially if they are in conflict with the program being evaluated.
- Creative methods often produce interesting and novel insights about programs and initiatives.
- Creativity in evaluation supports innovation in programming.

Creative evaluation is compatible with participatory evaluation in that it encourages evaluators to figure out ways of involving program stakeholders in the evaluation process even though they may not have the knowledge, skills, or disposition to participate in conventional ways.

Notes

Steps for incorporating creative methods into your evaluation:

1. Review the research questions you developed for evaluating your objectives to determine the kinds of information you need to answer your questions.
2. Consider the backgrounds, life situations, and educational and literacy levels of program participants and other stakeholders. Develop an "evaluation profile" for each stakeholder group that describes their communicative strengths and challenges, their preferred modes of interaction, their availability and interest in participating in the evaluation process.
3. Based on these profiles, determine whether creative data collection methods will be more effective than conventional methods for engaging with each group in the evaluation process and gathering information from them.
4. If conventional methods pose challenges or limitations, determine what creative methods complement the group's evaluation profile.

Examples of creative evaluation methods you might use:

Qualitative methods used to gather *narrative accounts*:

- Role-playing, storytelling, life history accounts or dramatic vignettes which are audio-taped or video-taped.
- Personal narratives, journals, or processing activities in which responses are written down.

<u>Example</u>: To determine a program's successes and challenges in connecting participating women to manufacturing employers with entry level opportunities:

Participating women attend bimonthly processing meetings in which they write personal narratives about their experiences moving through the pipeline and share their stories with other participants.

Qualitative methods used to gather *pictorial (visual) accounts*:

- Documentary photography
- Videotaping
- Visual art projects

<u>Example</u>: To determine a program's impact on high school students' knowledge about attitudes toward the trades:

Ask the participants to produce self-portrait collages of themselves as tradeswomen before and after the program. Display the self-portraits to the group and conduct an audio-taped discussion of the art. During the evaluation process, have the participants compare the two self-portraits as a way to discuss the impact of the program.

Advantages and challenges of incorporating creative evaluation methods

Advantages:

- Creative methods may be less threatening to some participants than conventional evaluation methods.
- Creative methods may bring to light knowledge, perspectives, and experiences that conventional methods keep from view.
- Creative methods encourage program staff and participants to link the program to broader issues, such as the participants broader life experiences.
- Using creative evaluation methods tends to support and encourage the use of innovative programming.

Challenges:

- Funders might find some creative methods unacceptable (they may claim they are not rigorous or do not produce useful results).
- Use of technology (cameras and video cameras) may need to be negotiated with program stakeholders.
- Some data collected using creative methods may be difficult to analyze.

Notes

Participatory Evaluation

Participatory evaluation is more than a method; it is an empowerment approach to evaluation, based on the philosophy that program staff and program participants can effectively evaluate the quality of their programs. This manual as a whole takes a participatory approach to evaluation, in that it guides program staff in how to conduct their own evaluation rather rely exclusively on an outside evaluator.

However, participation can go one step further. This section addresses evaluation in which the program participants themselves are included in the evaluation. Participants can become involved in developing evaluation plans, designing the evaluation tools, in collecting and analyzing the data, and in writing the evaluation report.

Participatory evaluation empowers participants in several ways:

- By considering their perspectives and experiences, it demonstrates that their knowledge counts.
- By including participants as equal partners in the evaluation process, they gain a sense of ownership of the program that serves them.
- By learning to conduct an evaluation, participants develop additional skills.

While participatory evaluation can use conventional or creative methods (or a combination of both), all participatory evaluation is creative in that it respects and takes into account the specific abilities, limits, and dispositions of program participants and other stakeholders.

✎ Notes

Steps for incorporating program participants in your evaluation:

1. Determine which stakeholders will want to participate which stages of the evaluation (developing program objectives; evaluation planning and design; data collection and analysis; writing the evaluation report).
2. Determine participants' prior knowledge of and experience with evaluation and assess whether evaluation training is needed and what resources will be required for training.
3. Work with participants to select evaluation methods and design evaluation tools they feel competent to implement.
4. Work with participants to incorporate their involvement in the evaluation plan by describing the specific evaluation activities they will carry out.

Examples of participatory evaluation approaches you might use:

- To engage trainees in developing a pre/post survey for determining the impact of a training or educational program.: Conduct a pre-training focus group with program participants to learn about their expectations for the training, and their self-identified gaps in knowledge. Incorporate questions addressing those issues in the survey.
- To engage a range of stakeholders in an initiative designed to place and retain women in manufacturing jobs, convene a representative group of stakeholders to review and revise drafts of evaluation instruments such as survey questionnaires and interview schedules.
- To engage high school students in the evaluation of a trades education program at their school, the program curriculum can include the development of the program's objectives, collecting information about the program, and processing activities to determine the program's effectiveness.

Advantages and challenges of conducting a participatory evaluation

Advantages:

- Involving participants in the evaluation gives them a sense of ownership of, commitment to, and understanding of the program.
- Involving participants and other stakeholders increases their understanding of the value of evaluation.
- Involving participants in the evaluation process will contribute to the quality and value of the program evaluation because the takes the participants' needs and perspectives seriously.

Challenges:

- To effectively include program participants in the evaluation process participatory evaluation has to be included in the program <u>and</u> evaluation design.
- Not all program participants may have the time or inclination to engage in evaluation activities.
- Participatory evaluation can be time-consuming and less efficient than conventional evaluation.
- Some funders may not be receptive to participatory evaluation.
- Additional resources may be required to facilitate training of participant-evaluators.

Notes