

Getting Everyone on the Same Page

Practical Strategies for Evaluator-Stakeholder Communication

The webinar will begin at 1 p.m. Eastern.



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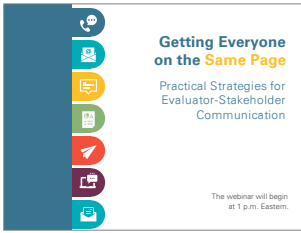
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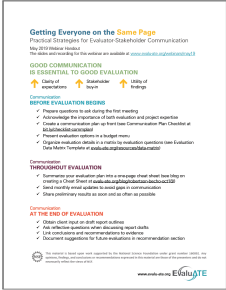
MATERIALS



Getting Everyone on the Same Page
Practical Strategies for Evaluator-Stakeholder Communication

The webinar will begin at 1 p.m. Eastern.

Slides



Getting Everyone on the Same Page
Practical Strategies for Evaluator-Stakeholder Communication

GOOD COMMUNICATION IS ESSENTIAL TO GOOD EVALUATION


CONNECTIONS

BEFORE EVALUATION BEGINS

THROUGHOUT EVALUATION


AT THE END OF EVALUATION

Handout




Recording


INTRODUCTIONS




Mike Lesiecki




Lyssa Wilson Becho



Kelly Robertson



Luka Partners





EvaluATE



BEHIND THE SCENES

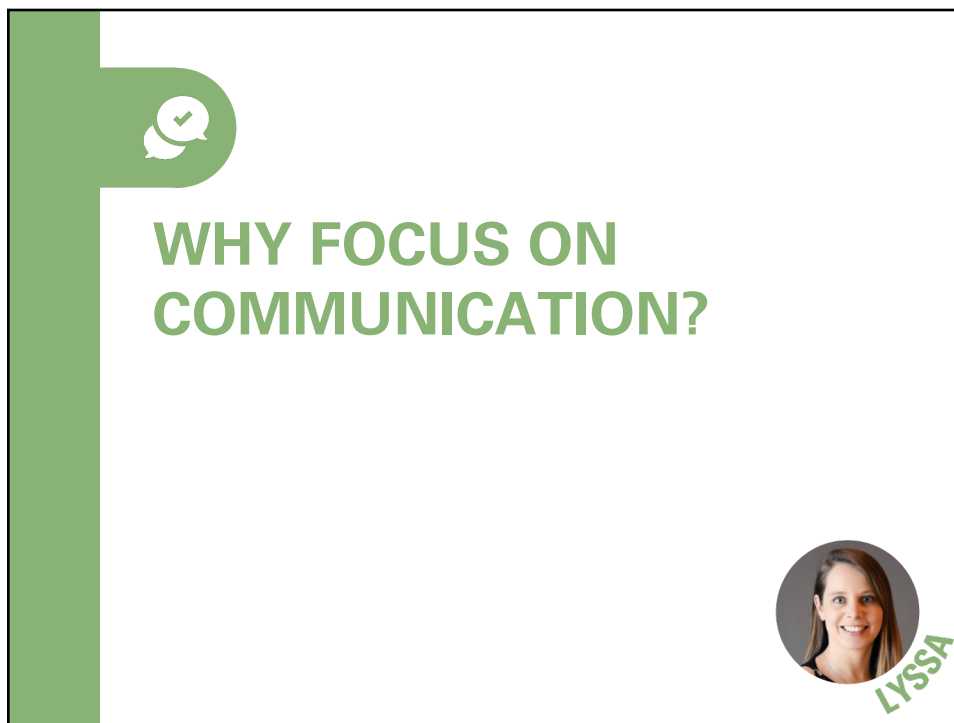
				
Emma Perk	Lori Wingate	Cynthia Williams	Janet Pinhorn	Shannon Payne


		
 WESTERN MICHIGAN UNIVERSITY		




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Any opinions, findings, and conclusions or recommendations expressed in this material are those of the presenters and do not necessarily reflect the views of NSF.





WHY FOCUS ON COMMUNICATION?


LYSSA





IF YOU ARE AN ...

evaluator





IF YOU ARE A ...
principal investigator or
other project staff



HAVE YOU EVER...





HAVE YOU EVER...
been confused about the purpose of
an evaluation activity?




HAVE YOU EVER...
received an piece of evaluation data
too late for it to be useful?

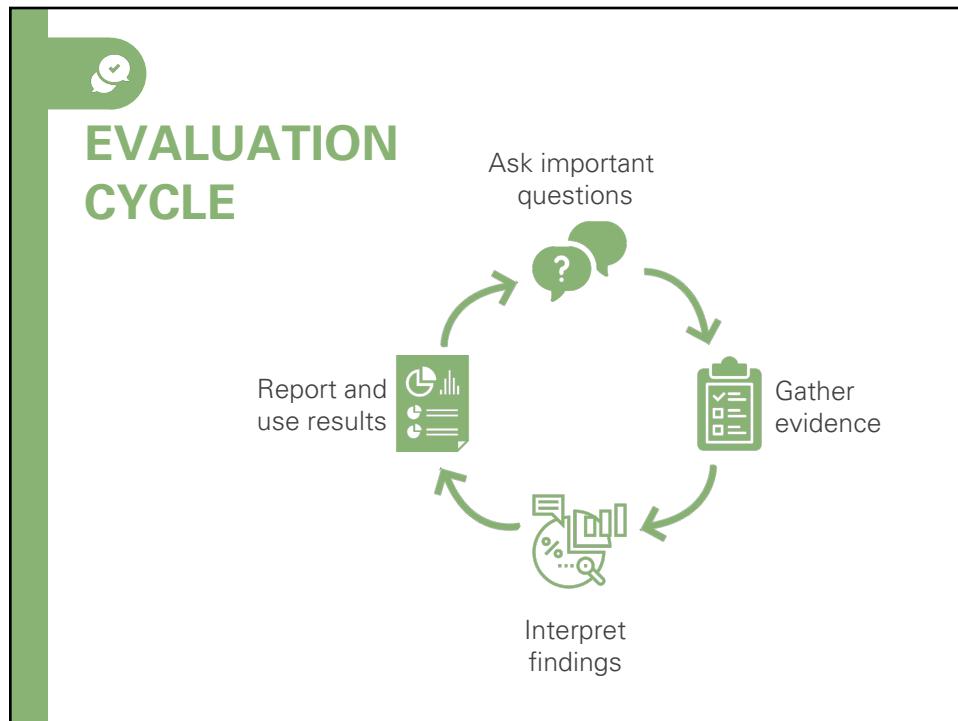




HAVE YOU EVER...
found that the final evaluation report
didn't address important project
needs?



**GOOD
COMMUNICATION**



GOOD COMMUNICATION IS ESSENTIAL!

- ↑ Clarity of expectations
- ↑ Stakeholder buy-in
- ↑ Utility of findings



Agenda

- BEFORE EVALUATION BEGINS**
Question break!
- THROUGHOUT THE EVALUATION**
Question break!
- AT THE END OF THE EVALUATION**
Question break!

Communication
**BEFORE
EVALUATION
BEGINS**

KELLY



QUESTIONS EVALUATORS ASK

What should evaluators ask clients in the first meeting?



QUESTIONS EVALUATORS ASK

Go-to questions for first meetings

- Why do you want to have an evaluation conducted?
- How do you know when the project is successful?
- What challenges do you anticipate with implementation of the project?
- How would you like the evaluation results communicated?



QUESTIONS CLIENTS ASK

What should clients ask evaluators in a first meeting?



QUESTIONS CLIENTS ASK

Go-to questions for first meetings

- How often will we be in contact?
- How will you ensure the evaluation will be designed for my audience or context?
- How far in advance will we receive draft reports?
- Can I see an example of your reports?
- Will you make recommendations in the report?

BUDGET MENU

Create a budget menu

Draft Evaluation Options
 Economic Self-Sufficiency Program
 Time Period: January–July 2017

	\$XX,000 Budget	\$X,000 Budget
Overview of Purpose	Qualitative: Collect detailed accounts of Program strengths and weaknesses. Also, identify how the Program has changed the lives of four families. Quantitative: Collect, analyze, and report on some of the existing quantitative data.	Qualitative: Collect information on strengths and weaknesses of the Program. Quantitative: Collect, analyze, and report on some of the existing quantitative data.
Activities	<ul style="list-style-type: none"> • Observe meeting • Hold focus group with participants • Interviews sample of participating parents • Collect existing quantitative data • Analyze qualitative and quantitative data • Report data back to stakeholders 	<ul style="list-style-type: none"> • Observe meeting • Hold focus group with participants • Collect existing quantitative data • Analyze qualitative and quantitative data • Report data back to stakeholders
Deliverables	Written report analyzing qualitative & quantitative data <ul style="list-style-type: none"> • More qualitative data collected • Begin to answer some of the identified evaluation questions • Quick access to quantitative data 	Written report analyzing qualitative & quantitative data <ul style="list-style-type: none"> • Data quality limited • Quick access to quantitative data • Less expensive
Pros	<ul style="list-style-type: none"> • Can better represent program activities and mission • Moves evaluation capacity strengthening process more quickly 	<ul style="list-style-type: none"> • Cannot make causal claims • Data quality limited
Cons	<ul style="list-style-type: none"> • Would require staff to ensure there is pre- and post-data for all families on 5 indicators • More expensive 	<ul style="list-style-type: none"> • Would require staff to ensure there is pre- and post-data for all families on 3 indicators • Evaluation capacity development process would move more slowly

EVALUATION MATRIX

Use a matrix to maximize communication

Evaluation Methods

Approach
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Criteria
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Indicators
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Data Sources
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Data Collection Methods
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Evaluation Methods

Approach
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Questions, Criteria, and Data Collection Methods
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Questions	Criteria	Indicators	Data Sources & Collection Methods
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2. Nam augue, tempus sed orci non, efficitur lobortis augue?	Nullam ut cursus risus vestibulum Porta mauris	Integer lacus pellentesque Interdum nibh	Quis ante orci Pellentesque lacus
	Risque vestibulum Nullam ut cursus	Interdum nibh Integer lacus	Nam augue Mauris id orci

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EVALUATION MATRIX
 Use a matrix to maximize communication


Must have Combine

Evaluation Question	Criteria	Indicators	Standards	Method / Source	Instrument
<i>(What want to know?)</i>	<i>(Dimension of quality)</i>	<i>(What will be measured?)</i>	<i>(What does success look like?)</i>	<i>(How gather data and from where)</i>	<i>(Tool used to collect data)</i>

Everyday description

EVALUATION MATRIX
 Example

Criteria <i>(Dimension of Quality)</i>	Indicators <i>(What was measured)</i>	Data Source/Instrument <i>(Who collect data from/ What tools used)</i>	Success Targets <i>(How to identify success)</i>
To what extent did participant trauma behavior change?			
PTSD symptom levels	PTSD Symptoms Scores	Participants/ PSS Instruments	Pre/Post change statistically significant at the .1 level using Wilcoxon signed rank test
PTSD symptoms' level of impact on daily life	PTSD symptom interference in daily life		
Safe coping behaviors, self-esteem, self-efficacy, and resilience	Safe coping behavior scores (safe coping behavior, substance use, self-esteem, self-efficacy, & resilience)	Participants/ SSQ Instruments	
To what extent did the Project educate the community about trauma?			
Reach community members	# of people trained	ORG documents or database	150 by 9/30/2020
Demonstrate change in knowledge	# change in knowledge about impact of trauma and violence on adult functioning on pre/post-test scores	Presentation pre/post feedback form	120 by 9/30/2020




ACKNOWLEDGE EXPERTISE

Utilize multiple knowledge bases

Evaluation Expertise Project Expertise

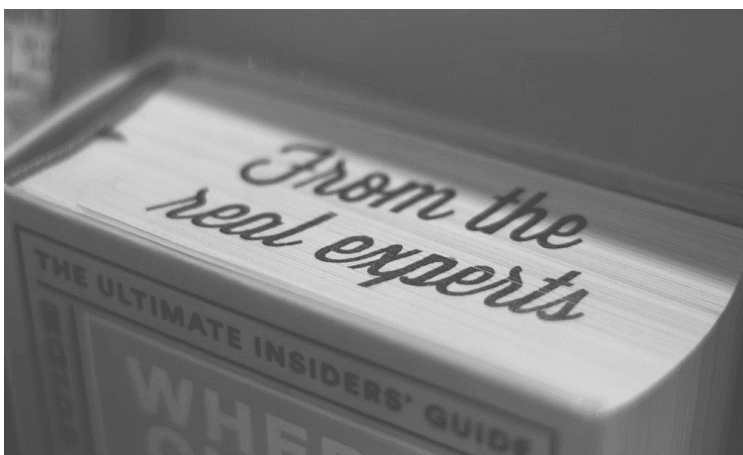


The diagram shows a balance scale with a horizontal beam supported by a triangular fulcrum. Two identical grey rectangular weights are placed on the beam, one on each side of the fulcrum. The text 'Evaluation Expertise' is positioned above the left weight, and 'Project Expertise' is positioned above the right weight. The text 'Quality Evaluation' is centered below the beam.




ACKNOWLEDGE EXPERTISE

Utilize multiple project expertise



The image shows a stack of books. The top book has the title 'From the real experts' written in a cursive font. Below it, the text 'THE ULTIMATE INSIDERS' GUIDE' is visible in a sans-serif font. The books are slightly blurred, suggesting a shallow depth of field.



COMMUNICATION PLAN

Put it in writing!


EvaluATE Communication Plan Checklist
for ATE Principal Investigators and Evaluators
Suzsa W. Becker and Lori A. Wengle | October 2017

Creating a clear communication plan at the beginning of an evaluation can help project personnel and evaluators avoid confusion, misunderstandings, or uncertainty. The communication plan should be an agreement between the project's principal investigator and the evaluator, and followed by members of their respective teams. This checklist highlights the decisions that need to be made when developing a clear communication plan.

- Designate one primary contact person from the project staff and one from the evaluation team. Clearly identify who should be contacted regarding questions, changes, or general updates about the evaluation. The project staff person should be someone who has authority to make decisions or approve small changes that might occur during the evaluation, such as the principal investigator or project manager.
- Set up recurring meetings to discuss evaluation matters. Decide on the meeting frequency and platform for the project staff and evaluation team to discuss updates on the evaluation. These regular meetings should occur throughout the life of a project.
Frequency – At minimum, plan to meet monthly. Increase the frequency as needed to maintain momentum and meet key deadlines.
- Platform** – Real-time interaction via phone calls, web meetings, or in-person meetings will help ensure those involved give adequate attention to the matters being discussed. Do not rely on email or other asynchronous communication platforms.
- Agenda** – Tailor the agenda to reflect the aspects of the evaluation that need attention. In general, the evaluator should provide a status update, identify challenges, and explain what the project staff can do to facilitate the evaluation. The project staff should share important changes or challenges in the project, such as delays in timelines or project staff turnover. Conversations should close with clear action items and deadlines.
- Agree on a process for reviewing and finalizing data collection instruments and procedures, and evaluation reports. Determine the project staff's role in providing input on instruments (such as questionnaires or interview protocols), the mechanisms by which data will be collected, and reports. Establish a turnaround time for feedback, to avoid delays in implementing the evaluation.
- Clarify who is responsible for disseminating reports. As a rule of thumb, responsibility and authority for the distribution of evaluation report lies with the project's principal investigator. Make it clear whether the evaluator may use the reports for their own purposes and under what conditions.

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- Designate primary contacts
- Set up recurring meetings
- Agree on deliverable review process
- Clarify who is responsible for disseminating reports




SUMMARY

Communication before the evaluation begins

- Prepare questions to ask at first meeting
- Present evaluation options in a budget menu
- Organize evaluation matrix by questions
- Acknowledge evaluation and project expertise
- Create a communication plan



Communication **THROUGHOUT THE EVALUATION**



LYSSA



CHEAT SHEETS

Make your evaluation plan useful



CHEAT SHEETS

Make your evaluation plan useful

Evaluation Plan

Approach
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Questions, Criteria, and Data Collection Methods
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Questions	Criteria	Indicators	Data Sources & Collection Methods
1. Nam vestibulum, interdum morci non, efficitur pellentesque?	Eget elementum Mauris id mollis	Tristique metus Mauris interdum	Augue namu Nam magna
2. Nam augue, tempus pell-ond non, efficitur lobortis augue?	Porta mauris Risus vestibulum	Integer lacus pellentesque Interdum nibh	Quis ante orci Pellentesque latus Nam augue

Evaluation Summary 2018
Youth Trauma Modification Project
Client Organization
 Project Contract 1 Name: (000) 400-2000
 Evaluation Team Leader: (000) 200-4000

Evaluation Questions	When reported?		
	Quarterly	Semi-Annually	Annually
1. Who is the project serving?			
2. To what extent are individuals utilizing Project services?	✓	✓	✓
3. To what extent did participant trauma behavior change?	✓	✓	✓
4. To what extent are barriers to participation being addressed?	✓	✓	✓
5. To what extent did the Project educate the community about trauma?	✓	✓	✓
6. How can the Project be improved?	✓	✓	✓

2019 Evaluation Timeline

Activities

Interviews with participants

Last updated 5/2/2019

CHEAT SHEETS

Attention to details

Evaluation Summary 2018
Youth Trauma Modification Project
Client Organization
 Project Contract 1 Name: (000) 400-2000
 Evaluation Team Leader: (000) 200-4000

Evaluation Questions	When reported?		
	Quarterly	Semi-Annually	Annually
1. Who is the project serving?			
2. To what extent are individuals utilizing Project services?	✓	✓	✓
3. To what extent did participant trauma behavior change?	✓	✓	✓
4. To what extent are barriers to participation being addressed?	✓	✓	✓
5. To what extent did the Project educate the community about trauma?	✓	✓	✓
6. How can the Project be improved?	✓	✓	✓

2019 Evaluation Timeline

Activities

Interviews with participants

Last updated 5/2/2019

- Include date on top
- Include project and evaluator phone numbers
- Make changes obvious
- Include "last updated" date

Slides, video, and handout:
www.evalu-ate.org/webinars/may19

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CHEAT SHEETS
 Summary of deliverables

Deliverables

Evaluation Questions	When reported?		
	Quarterly	Semi Annually	Annually
1. Who is the project serving?			✓
2. To what extent are individuals utilizing Project services?	✓	✓	✓
3. To what extent did participant trauma behavior change?			✓
4. To what extent are barriers to participation being addressed?			✓
5. To what extent did the Project educate the community about trauma?		✓	✓
6. How can the Project be improved?		✓	

Matched with questions

CHEAT SHEETS
 Timeline of major milestones


2019 Evaluation Timeline

Activities

Interviews with participants

Deliverables

Deadlines

 **CHEAT SHEETS**
Simplified evaluation matrix


Data Collection Details


Methods	Who	When collected?	Purpose	Sample
Project Database	Project	Ongoing, Send to Eval Feb, April, August, & Oct	Track participant and implementation data	All participants
Interview/ focus group protocols	Eval	March/April 2018	Satisfaction, areas for improvement	Participants not complete Graduates
Interview protocol	Eval	August/September 2018	Impact on life (interviews)	Graduates
Presentation feedback form	Project	Before and after presentation	Assess knowledge about trauma	All attendees

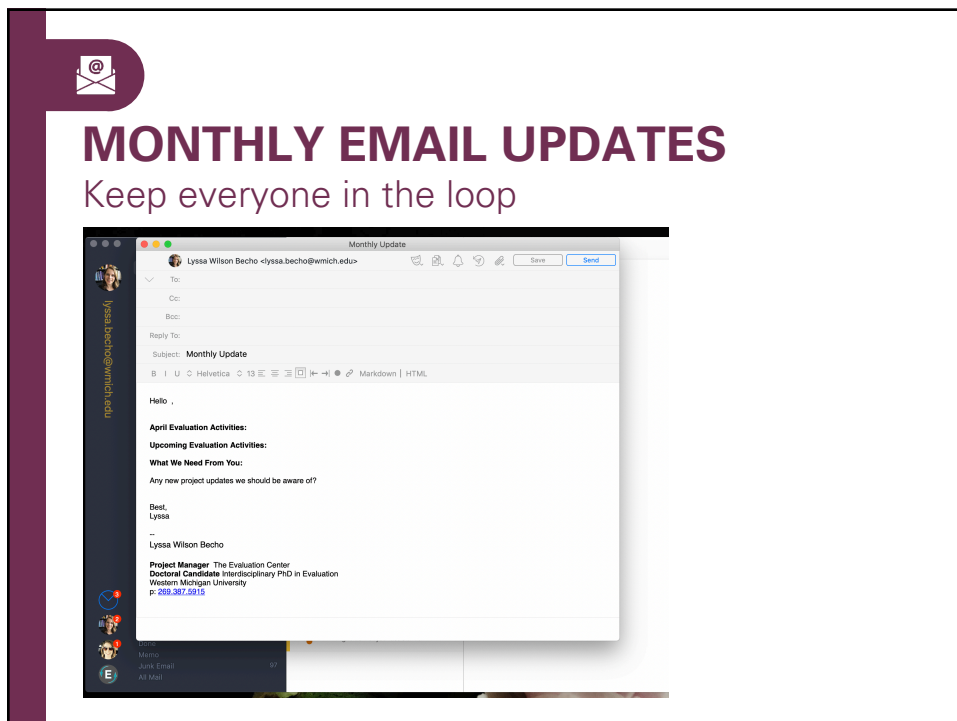
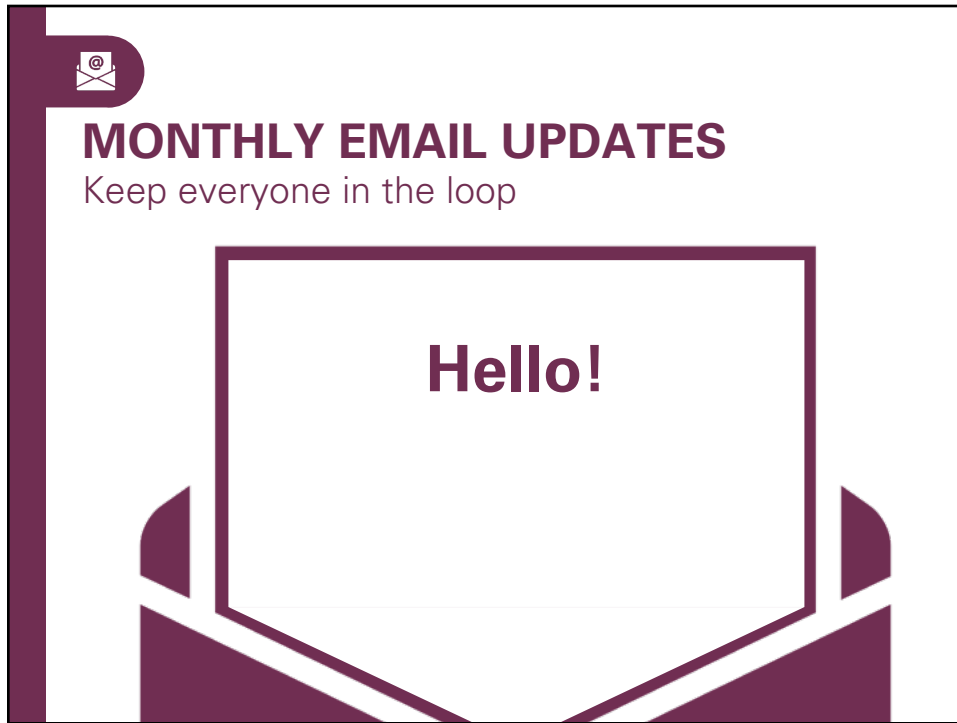
Who is responsible


When

Sample

 **CHAT QUESTION**
What would you find helpful in
a cheat sheet?







MONTHLY EMAIL UPDATES


Keep everyone in the loop

Past Month's Eval Tasks

Upcoming Eval Activities


Asks from Client

Any Project Updates?




SHARE FINDINGS AS AVAILABLE


Avoid surprises at the end of an evaluation




Increase use
for program
improvement



Increase
ownership
and buy-in



Increase
validity of
interpretation



SHARE FINDINGS AS AVAILABLE

Avoid surprises at the end of an evaluation

Preliminary Findings

Lyssa Wilson Becho <lyssa.l...> Save Send

To:

Cc:

Bcc:

Reply To:

Subject: Preliminary Findings

B I U ↺ Helvetica 13 pt [font icons] [text icons] | Markdown | HTML

Here are some of our preliminary findings. We would like to hear some of your feedback and reactions.


- Preliminary finding #1:
- Preliminary finding #2:
- Preliminary finding #3:

!

..

Lyssa Wilson Becho

Project Manager The Evaluation Center
 Doctoral Candidate Interdisciplinary PhD in Evaluation
 Western Michigan University
 p: 269.387.5915



SHARE FINDINGS AS AVAILABLE

Avoid surprises at the end of an evaluation

Year 3 Annual Report
Preliminary Results

1 No evidence of decrease in trauma symptoms
While trauma scores vary slightly, there is no statistically significant differences in the change. No differences were found based on clients' group attendance, age, ACE score, or receipt of supports.

	Pre-program	Mid-program	Post-program	6 months post-program
PTSD average score	28	19	25	27
(max score = 53)	200	150	125	75

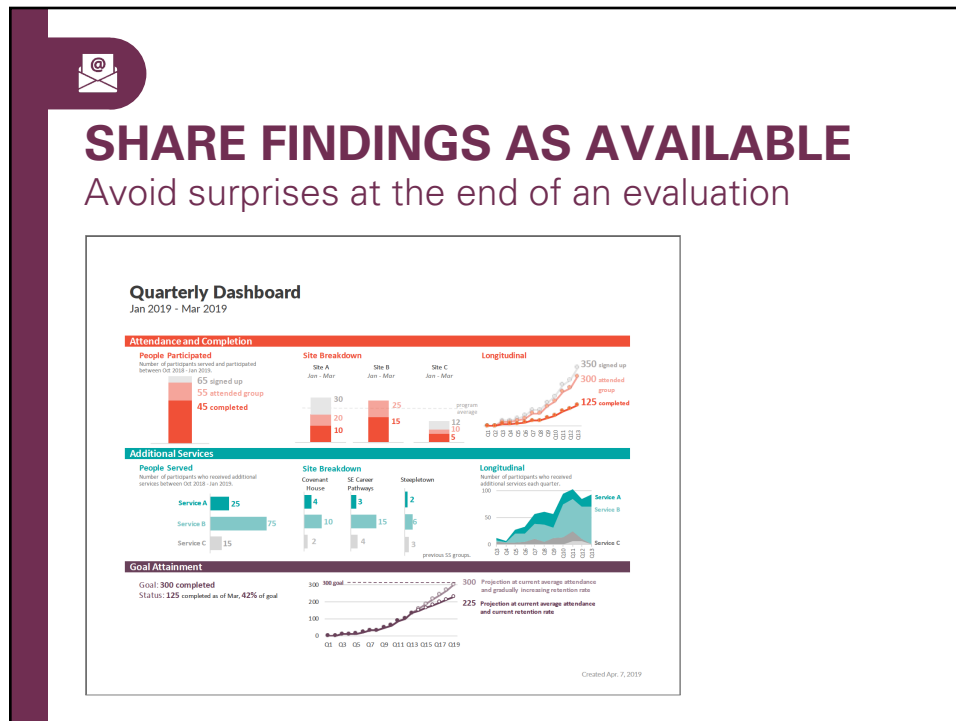
2 Safe coping behaviors increased
The difference between pre-program and mid-program measurement is statistically significant.

	Pre-program	Mid-program	Post-program	6 months post-program
Safe coping behaviors average score	28	32	39	37
(max score = 53)	200	150	125	75

3 Clients' self-esteem, self-efficacy, and resiliency remained the same
Only the difference between the pre-program and mid-program measurement for self-esteem and self-efficacy are statistically significant. Only the difference between the pre-program and post-program measurement for resilience is statistically significant.

	Pre-program	Mid-program	Post-program	6 months post-program
Self-esteem average score	15	19	15	13
(max score = 28)	12	13	13	12
Self-efficacy average score	17	18	18	17
(max score = 25)	200	150	125	75

Preliminary Results from Year 3 Annual Report | Created for Quarterly Meeting | Dec. 2018



-
- ## SUMMARY
- Communication throughout the evaluation
- ✓ Summarize evaluation plan in a cheat sheet
 - ✓ Send monthly email updates
 - ✓ Share preliminary results as available
 - ✓ Avoid surprises in final report



Communication
**AT THE END OF
THE EVALUATION**




KELLY



SHARE OUTLINES
When drafting reports






SHARE OUTLINES

When drafting reports

Semi-Annual Report Outline

Purpose of report: To provide a mid-year update on participation and identify program strengths and opportunities for internal improvement.

1. Who is the project serving?
 - a. # of participants completed intake
 - b. Demographics of participants
 - c. Participant trauma history (PSS score)
 - d. Adverse childhood experiences (ACE scores)
2. To what extent are the individuals utilizing project services?
 - a. # attend at least one group session
 - b. # completed 9 out of 12 sessions
 - c. Reasons for non-completion
 - i. As identified by staff (in spreadsheet)
 - ii. Reasons from interviews
3. Community Education: To what extent did the program educate the community about trauma?
 - a. # trained
 - b. # increased knowledge
4. How can the project be improved? –
 - a. Satisfaction of participants (from group feedback form)
 - b. Strengths of the program (from interviews & focus groups)
 - c. Suggestions for improvement (from interviews & focus groups)
 - d. Strategies to increase completion/retention (from interviews & focus groups)



SHARE OUTLINES

When drafting reports

Table 2. Overview of Evaluation Reports

Theme of Data	Reported delivered in 2020	Reported delivered in 2021
Evaluation	*Literature of evidence-based success targets and benchmarks	
Foundation		
Program Development	*Literature review on programmatic best practices	
Process/Improvement	*Participant feedback	*Participant feedback *Feedback from staff
	Self-sufficiency matrix data *Supplemental adult data *Child supplemental data *Data on internal measures (self-esteem, resilience, etc.)	Self-sufficiency matrix data *Supplemental adult data *Child supplemental data *Data on internal measures (self-esteem, resilience, etc.)
Outcomes Focused	Stories from families (active 4+years) documenting how their barriers to self-sufficiency have change	Stories from families (active 3 years or fewer) on how ORG has impacted their lives *Data on subsidy usage *Standardized education data (if possible) *ACE Score data



ASK REFLECTIVE QUESTIONS


Report revisions and next steps



ASK REFLECTIVE QUESTIONS

Next steps

- Based on the report, what aspects of the program need improvement?
- How can we facilitate your use of this report?
- What unanswered questions do you have?
- What do you want to see different on the next deliverable?



POLL QUESTION

Which do you think will result in increased use?

A

Recommendations

Project
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Recommendations

Project
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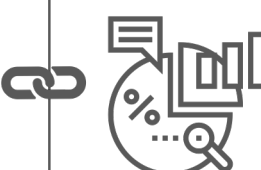
Recommendation	Evidence
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LINK TO EVIDENCE

Conclusions and recommendations

Action or Judgement	Why
	

Slides, video, and handout:
www.evalu-ate.org/webinars/may19

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LINK TO EVIDENCE

Recommendations

Action

Recommendations	Evidence for Recommendations
Instructional Content Make Action Plan to Improve Content: Create an action plan to improve instructional materials—especially handouts and videos—especially handouts and videos—or activities utilized during group sessions.	A large percentage of participants indicated the handouts and videos were “somewhat helpful” rather than “very helpful” in feedback forms. The percentage of individuals who indicated the material was “somewhat helpful” is as follows: Activities and discussion 29%, handouts 53%, and videos 72%.

Why



EVALUATION RECOMMENDATIONS

Document suggestions for future evaluations





EVALUATION RECOMMENDATIONS


Document suggestions for future evaluations

- **Improve the usability of information from session feedback forms.** In conversations with Project staff, it was revealed that participants do not always take feedback forms seriously and the forms are not currently helpful in improving individual sessions. The forms were originally designed to assess feedback during the planning phase, and since that phase is over, a shortened form can be created and distributed less frequently, to reduce the reporting burden on respondents. The evaluation team also plans to satisfaction add items to the feedback form and add a question to learn why participants are not engaging in alternative therapy.

Problem

Why

Action



SUMMARY

Communication at the end of the evaluation

- ✓ Share report outlines
- ✓ Ask reflective questions about reports
- ✓ Link evidence with conclusions & recommendations
- ✓ Document suggestions for future evaluations



GOOD COMMUNICATION IS ESSENTIAL!

↑ Clarity of expectations ↑ Stakeholder buy-in ↑ Utility of findings



Getting Everyone on the Same Page
Practical Strategies for Evaluator-Stakeholder Communication
May 2019 Webinar Transcript
The slides and recording for this webinar are available at: www.evalu-ate.org/webinars/may19/

GOOD COMMUNICATION IS ESSENTIAL TO GOOD EVALUATION
↑ Clarity of expectations ↑ Stakeholder buy-in ↑ Utility of findings

Communication BEFORE EVALUATION BEGINS

- ✓ Prepare questions to ask during the first meeting
- ✓ Acknowledge the importance of both evaluation and project expertise
- ✓ Create a communication plan up front (see Communication Plan Checklist at bit.ly/363k34t)
- ✓ Present evaluation options in a budget menu
- ✓ Organize evaluation details in a matrix by evaluation questions (see Evaluation Data Matrix Template at evalu-ate.org/essou/cas/cas16a.html)

Communication THROUGHOUT EVALUATION

- ✓ Summarize your evaluation plan into a one-page cheat sheet (see blog on creating a Cheat Sheet at evalu-ate.org/blog/libertson/ba0c8e10)
- ✓ Send monthly email updates to keep pace in communication
- ✓ Share preliminary results as soon and as often as possible

Communication AT THE END OF EVALUATION

- ✓ Obtain client input on draft report outline
- ✓ Ask reflective questions when discussing report drafts
- ✓ Link conclusions and recommendations to evidence
- ✓ Document suggestions for future evaluations in recommendation section

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The webinar will begin at 1 p.m. Eastern.

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