Change Evaluation - Is Your Initiative Working?

Notes from the conversation between Heather Stagl of Enclaria LLC and Maria Gajewski of Changing River Consulting, May 11, 2010

Listen to the replay of the show at The Change Agent's Dilemma

What is Evaluation?

Simply put, evaluation is a process used to measure progress toward goals.

Why Evaluate a Change Process?

Most change initiatives take time. Major initiatives can take 3 to 5 years, or more. It would be a huge waste of resources to get to the end of a 5 year initiative, only to find that it isn't working. Evaluating performance at short, regular intervals will help you make adjustments along the way to give you a better chance of success.

How Do You Design an Evaluation?

1. Decide on your purpose. What do you want to achieve when the process is done? Who is the evaluation for? Your team? Management? Line workers?
2. Decide on the question(s) you want to answer in the evaluation. Keep it simple. Tie questions to your purpose. Decide on the types of data you want – outputs (numbers), outcomes(short term), and impacts(long term, life changing).
3. Select measurement tools and gather the data. Some options for gathering data include:
    * One on one interviews
    * Focus groups
    * Surveys
    * Pre and post tests
    * Time logging
    * Productivity studies
    * Internal data
4. Some resources for surveying include (in order from most user friendly to most feature rich, but complex):
    Survey Monkey
    Zoomerang
    Google Docs Forms
    LimeSurvey

How do you know if you've created change?

1. Analyze the data. If you want to be fancy, you can test for statistical significance on survey results, or use qualitative analysis software like ATLAS.ti, but this is not usually necessary for smaller initiatives. Instead, summarize the data that you have in a way that is usable to your organization and team. Sites like Survey Monkey will do some analysis for you.
2. Discuss the findings. What do they tell you about the successful and not-so-successful pieces of your change initiative? What do you need to change and what can you bring to scale?
3. Make adjustments as needed.

What do you do next?

1. Evaluate at regular intervals. For a multi-year project, every quarter or every six months is probably sufficient. For shorter projects, shorten the intervals.
2. Keep making adjustments. Your plan can and should change based on the findings of the evaluation. If it looks the same in five years, you are either a genius, or you haven't made enough adjustments along the way.

I Want More

If you'd like to delve into any of these topics in more depth, Maria would be happy to give Enclaria listeners a free mini-consult via email maria@changing-river.com or Twitter @Maria_G

There is a ton of information on evaluation on the internet, but almost all of it is written for nonprofits working to create social change. With that in mind, two of the best guides to evaluation are:
*   The Innovation Network's Evaluation Plan Workbook
*   Kellogg Foundation's Evaluation Handbook

About Maria

As the Chief Assistant to World Savers at Changing River Consulting, Maria Gajewski helps nonprofit organizations measure their work, improve their weaknesses and celebrate their successes. She has worked with organizations ranging in size from all volunteer groups to statewide membership organizations. When working with organizations she teaches them that evaluation can in fact be more fun than a root canal while helping them do their work even better.