**Evaluation Basics**

Evaluating your nonprofit's programs is crucial for understanding their impact, improving services, and demonstrating value to funders and your community. This guide outlines key steps and practical suggestions to help you conduct a basic evaluation, even with limited resources and minimal evaluation experience.

# 1. Define Your Evaluation Purpose

Why evaluate?

* Accountability: Show funders and stakeholders that your program delivers results.
* Improvement: Identify what works well and what could be improved.
* Learning: Understand how participants experience your program.

Practical Tip:

* Start small: Focus on one or two main questions you want to answer.
* For example:
	+ Who attended the program?
	+ What did participants think about the program?
	+ Did the program help participants achieve specific outcomes or goals?

# 2. Develop Evaluation Questions

What do you want to learn?

* Participant Experience (Feedback): How did participants feel about the program? Did it meet their needs? Is there a way it could better meet their needs?
* Outcomes (Benefits): Did the program lead to the desired changes or improvements in participants’ lives?

Practical Tip:

Be specific: Instead of asking "Was the program helpful?" ask "Did participants improve their skills after completing the program?"

# 3. Choose Simple Data Collection Methods

How will you gather information?

Choosing the right data collection methods is essential for getting the information you need without being overwhelmed by it.

**Reach + Quality**

While it’s important to understand the reach of a program – how many people were served or reached – organizations should also have some way of understanding if their program benefitted the participants as intended. To understand the quality of a program, organizations might consider collecting data in these common ways:

* Surveys: Gathering information from individuals or groups through structured questionnaires or survey tools with quantitative scale (i.e. 1 to 5) to provide a numerical or quantitative understanding of experience or change.
* Interviews: Conducting 1:1 or group interviews to collect in-depth qualitative data from stakeholders, beneficiaries, or experts to hear directly from them in their own words about what your program achieved, its impact, or how it might be improved.
* Observations: Directly observing and documenting behavior, activities, images or events to collect qualitative or quantitative data about what your program achieved, its impact, or how it might be improved.
* Document Reviews: Analyzing existing documents, reports, internal records, and secondary sources to extract relevant data.
* Focus Groups: Facilitating discussions with a small group of participants to gather insights and opinions on specific topics or issues. This is similar to interviews but gathers multiple perspectives in a single session.
* Stories/Testimonials: Requesting or accepting personal stories or perspectives shared by participants, in an as needed or informal manner.
* Diaries/Logbooks: Requesting participants to regularly record their thoughts, behaviors, or experiences over time.
* Arts-based methods: Guiding participants through an arts-based activity to help participants express their experiences and perspectives.

Check out this [table in the appendix](#_Appendix:_Table_of) outlining different pros, cons and considerations of the data collection methods listed above.

Using multiple approaches enables a fuller understanding of the success of a program:

1. Understand **reach**:

* use attendance records,
* count views/downloads for awareness campaigns, or
* track daily counts of drop-in participation

2. Understand **experience**:

* collect service quality/experience data, and/or
* ask for feedback in people’s own words

3. Understand **benefits** of program experienced by participants using one or more of these:

* Collect stories of impact in participants own words (via interviews, focus groups or open-ended question in survey)
* Use arts-based methods to engage participants to share their experiences
* Use quantitative outcome focused questions to measure change

Practical Tip:

Test your tools: Before full deployment, pilot your survey or interview questions with a small group to identify any confusing or unclear questions. Find out if your questions align with their view of the program’s benefits to them.

# 4. Collect Data Efficiently

When and how will you collect data?

Efficient data collection is about timing, logistics, and making the most of the resources you have. Here’s how to streamline the process:

* Timing:
	+ Immediate Feedback: Collect participant feedback immediately after the program ends. This ensures that their experiences are fresh, leading to more accurate responses.
	+ Pre- and Post-Program Surveys: For outcome evaluations, consider using pre-program and post-program surveys to measure changes in participants’ knowledge, attitudes, or behaviors.
	+ Retrospective Pre-Post Surveys: Streamline data collection by collecting data at end of program, and asking participants to reflect on their experiences to gauge their own change, achievements or learning from two viewpoints – before and after participating.
* Sampling:
	+ Full Population vs. Sample: If your program serves a large number of participants, consider sampling—a smaller, representative group—rather than surveying everyone. Ensure your sample reflects the diversity of your participant group by being clear about your target population for the survey, having quotas for each target group (for example, by age or gender), and monitor responses. Collect more data for a certain group to try to meet the quota.
	+ Random Sampling: If possible, use random sampling to reduce bias. If this isn’t feasible, select participants who represent different demographics or program experiences.
* Data Collection Logistics:
	+ Survey Distribution: For in-person programs, distribute paper surveys at the end of a session or an online survey that can be accessed via smartphone or tablet. For remote programs, email or text a survey link. Offer incentives like small gifts or entry into a prize draw to increase response rates.
	+ Interview Scheduling: Schedule interviews or focus groups at convenient times for participants. If budget allows, consider compensation for their time.

Practical Tip:

* Automate where possible: Use tools that allow automatic reminders for survey completion and consider digital recorders or transcription apps to streamline interviews.
* Integrate where possible: Embed data collection within the program or service delivery by collecting pre data at registration if possible or saving time within the program to collect data. This will help increase the quality and completeness of the data you can collect.

# 5. Analyze and Interpret Data

What can you learn from the data?

Analyzing the data you collect is crucial for understanding the effectiveness of your program. Here’s how to approach analysis, even if you’re not a data expert:

* Quantitative Analysis:
	+ Basic Calculations: Start with simple calculations like frequencies (how many people gave a certain response), averages, and percentages. For example, calculate the percentage of participants reporting improved skills after the program. Most online survey platforms will provide these results.
	+ Comparative Analysis: If you have pre- and post-program data, compare results to see if there are significant changes. For instance, if 70% of participants rated their skills as "poor" before the program and only 20% did so after, this indicates positive outcomes.
* Qualitative Analysis:
	+ Thematic Analysis: For open-ended survey responses or interview transcripts, look for recurring themes or patterns. For example, if many participants mention that the program made them feel more confident, "increased confidence" could be a key theme.
	+ Coding: Assign codes or labels to similar responses to help organize your data. For example, group responses that mention "confidence," "self-esteem," and "empowerment" under a broader theme like "personal growth."
* Triangulation: Combine different data sources (e.g., surveys, interviews, observations) to get a fuller picture of your program’s impact. If survey results and interview feedback both point to increased confidence among participants, this strengthens your findings.

Practical Tip:

Visualization: Use simple charts, graphs, or tables to present your quantitative data. Visual aids can make your findings clearer and more accessible to colleagues, your board or community members.

# 6. Report Findings

How will you share what you learned?

* Internal Reporting: Share key findings with staff and board members to inform decision-making. Hear from frontline staff about if and how the results collected align with what they observed first-hand to enhance the meaning of results, and derive insights that can help inform improvements or future steps.
* External Reporting: Summarize results in a simple, clear format for donors, funders and community members.

Practical Tip:

 Be concise: Highlight the most important findings, using visuals like charts or graphs to make data easier to understand. Compliment those with stories or quotes to enhance understanding.

[See tip sheet](https://otf.ca/sites/default/files/Evaluation-Reporting-Tips_EN.docx).

# 7. Use Findings for Program Improvement

What will you do with the results?

* Refine Programs: Use feedback to make small adjustments that can improve participant experience and outcomes.
* Inform Planning: Apply what you’ve learned to future program design and funding proposals.

Practical Tip:

Create an action plan: Outline practical changes you can make based on your findings. Focus on 1-3 things you learned and can act on.

# Conclusion

Evaluating your nonprofit's programs doesn't have to be overwhelming or expensive. By focusing on a few key questions, using simple methods, and making the most of the data you collect, you can gain valuable insights that help you improve your programs and demonstrate your impact. Remember, the goal is to learn and grow, not to be perfect.

This guide provides a straightforward framework to help you get started with program evaluation. Keep it simple, stay focused, and use your findings to make a positive impact on your community.

Additional Resources:

Consider consulting our [third-party online resources](https://otf.ca/resources/third-party-resources) or connecting with local research institutions or evaluation networks for additional support and advice.

# Appendix: Table of Data Collection Methods

|  |  |  |  |
| --- | --- | --- | --- |
| **Method** | **Pros** | **Cons** | **Considerations** |
| Survey | * Cost effective
* Can reach a lot of people
* Easy to implement
* Produces quantitative data
* Can be online
 | * Limited depth (might not fully explain experiences)
* Response bias
* Survey fatigue
 | Requires clear, concise questions |
| Interviews | * Provides in-depth information and better understanding
* Provides quotes or stories to compliment quantitative data
 | * Time consuming
* Interviewer bias
* More effort to analyze
* Limited perspectives /experiences captured
 | Requires skilled interviewers |
| Observations | * No burden on participants
* Context-rich information can be captured
 | * Observer bias
* Limited to observable actions
* Time consuming
 | May need multiple observers for reliability |
| Document reviews | * Uses existing data found in records (e.g. registration, contact management, attendance records)
* Cost effective
 | * Limited depth (may lack details)
* Depending on data systems, can be time consuming
 | Accuracy depends on quality of documents or records |
| Focus Groups  | * Can capture diverse perspectives
* Provides in-depth information and better understanding
* Provides quotes or stories to compliment quantitative data
 | * Groupthink
* May not represent all voices
* Facilitator bias
 | Requires skilled facilitator |
| Stories/Testimonials | * Personal, impactful narratives
 | * May not be representative of participant experience
 | Can compliment quantitative data |
| Diaries/Logbooks | * Daily or regular insights over time are captured
* Can benefit participants if integrated into program
 | * Time consuming for participants
* Time consuming to analyze
 | Useful for tracking changes over time |
| Arts-based methods | * Encourages creativity
* Captures emotional depth
* Participants engaged in sensemaking
 | * Time consuming
* Can be difficult to analyze
 | Useful for engaging certain participants; requires skillful facilitator |