

Unpacking evaluation: connecting evaluation, learning and improvement

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group

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Today's Agenda

- Introductions
- Visioning
- Project contributions to the vision
- Partners and stakeholders in our projects
- Evaluative thinking and practice
- Introducing Developmental Evaluation
- Wrap up

Some common thinking about evaluation

- It's time consuming
- It's expensive
- It's produces long reports that are hard, and often boring, to read!
- It doesn't necessarily provide us with answers to the really important questions we have
- It's something we feel we have to do – but would rather not!



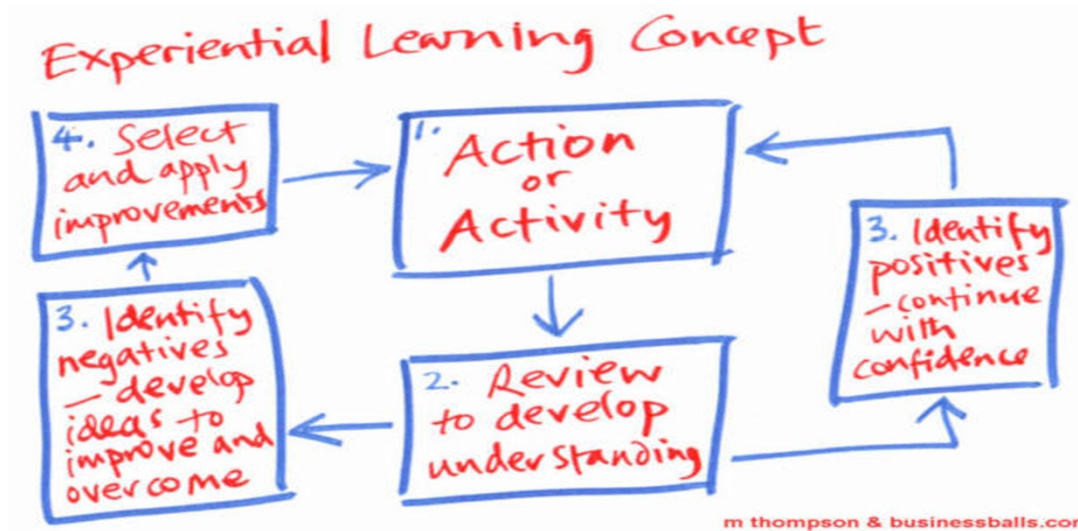
"Mind filling out this evaluation form first?"

It's just not that useful!

Group exercise: Reframing evaluation – connecting it to learning

- Reflect on a time when you experienced a powerful and positive learning experience
- In small groups – share with each other:
 - What happened?
 - Why was it powerful and positive?
 - What did you value about that experience?

Individual and organisational learning:



1. Occurs most effectively when people 'experience' something that disrupts or challenges their current frame of thinking

2. When people can then reflect upon this experience or learning

3. When learning can be reinforced and applied in other situations and contexts

Some individual barriers to learning

- Our individual motivation to learn is strongly influenced by our expected outcomes of an activity
- Our expectations about the outcome are shaped by our previous experience
- Previous negative experiences will have a strong influence on our beliefs and values
- We are inclined to only reluctantly seek feedback on our own performance, because this might imply or reveal failures, incompetence etc
- And then when we do we are biased toward interpretations consistent with prior beliefs and values
- We also have strong tendencies to self justify, even in the face of evidence that our actions or decisions were wrong.
- This cognitive dissonance ‘distorts reality, keeping us from getting all the information we need and assessing issues clearly’ (Tarvis & Aronson, 2007).

Organisations that support learning

Skills and abilities	Some useful references
Leadership / taking ownership /takes responsibility for learning and implementation of lessons learned	Liphshitz & Popper. (2000); Davidson. (2001); Nelson, & Millett. (2002) Barrados and Mayne, (2003); Baser and Morgan. (2008); Preskill and Boyle (2008); Gilson, Dunleavy and Tinkler. (2008).
Transparency – being prepared to expose ideas and practices to tough feedback and criticism and encourage a free flow of information	
Inquiry, questioning and mindfulness – Encouraging of open mindedness, collective problem solving and reflection (about success and failure) and ongoing inquiry to achieve better understanding	
Openness to taking risks, change and experimentation	
Perseverance to pursue inquiry to increase understanding	

So what has this got to do with evaluation?

- Evaluation / evaluative thinking is all about reflection – systematic reflection
- On things of importance, on things of value
- In order to do something – in a different way, a new improved way, a better way than before



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What is evaluation?

It is the systematic determination of the **quality, value or importance** of something (project, initiative, program, organisation etc) *in order to take action*



It is underpinned by the collection of information / evidence about the inputs, activities and outcomes of something i.e., a project, program, initiative or activity

Its key purposes are to determine **how well** something is doing or was done, **what its value** is or was, and if it is **worth doing** more of it

What makes evaluation different?

- The 'values' part
- E- **valu** - **ation** has three components

Descriptive facts +
(what so)



+ **evaluative**
conclusions and action
(so what?)

- Values get us from what so to so what

See E. Jane Davidson, *Evaluation Methodology Basics, The Nuts and Bolts of Sound Evaluation*, Sage, 2005

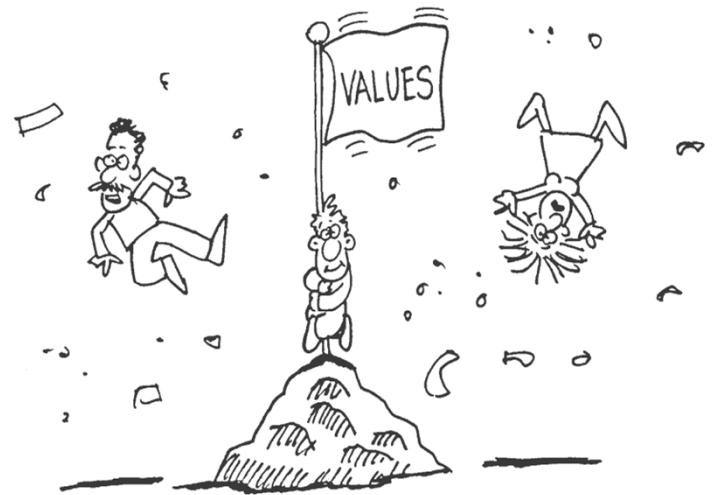
Values in evaluation?

On what basis will we decide or demonstrate to others that something we are doing is high **quality**, **valuable**, **worth doing**, or **important** to pursue?

And on what basis will we determine 'how good is good'?

Where will we get the **criteria** to make the judgments we need to make?

It is **values** that we look to help us make these judgments. When ever we remark or comment on how good something was, or how well someone did something, we are drawing on our values to make **evaluative judgments** about the **quality** and **value** of things.



Evaluative thinking and practice

Requires us:

- to get to the heart of what quality and value mean for people, from different worldviews and perspectives about the outcomes that matter, and the processes that contribute to these outcomes
- to reflect on, and then transparently incorporate these 'values' into our judgments about how 'good' our funding decisions, our programmes, or our outcomes are.

Evaluative rubrics

- An explicit way of defining “quality” and “value” for ourselves and for others:
 - Evaluative criteria (what aspects are important?)
 - Merit criteria (how good is “good”?)
 - Making a judgment, using these criteria, about how good, or excellent (or poor) something is, is call merit determination

Evaluative rubrics - a useful tool



- Makes the 'values' step transparent and explicit
- A broad-brush way of transparently defining what excellent, good, (etc) quality, value or performance would look like in practice

General guide for deciding how 'good' performance is on key evaluative questions

(E.J. Davidson, 2010)

Performance Descriptors for Key Evaluation Questions	
Excellent	Performance is clearly very strong or exemplary in relation to the question. Any gaps or weaknesses are not significant and are managed effectively.
Very Good	Performance is generally strong in relation to the question. No significant gaps or weaknesses, and less significant gaps or weaknesses are mostly managed effectively.
Good	Performance is reasonable in relation to the question. A few gaps or weaknesses, but none that are considered serious
Adequate	Performance is inconsistent in relation to the question. Some gaps or weaknesses. Meets minimum expectations/ requirements as far as can be determined.
Poor	Performance is unacceptably weak in relation to the question. Does not meet minimum expectations/requirements.
Insufficient evidence	Evidence unavailable or of insufficient quality to determine performance.

Visible

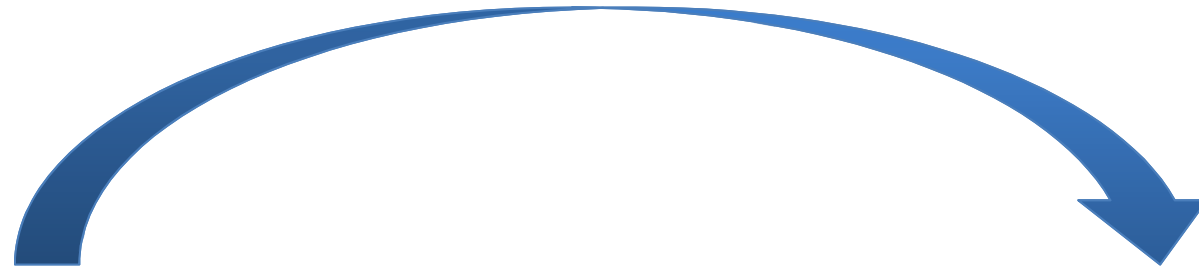


When the 'values' step is transparent and explicit, then it is more likely to expect:

- Genuine evaluative conversations (with more voices at the table) about
 - what 'success' looks like
 - what constitutes 'good' programme, organisational or sector delivery and outcomes

Leaping the critical 'values' step

(E.J. Davidson, 2010)



Descriptive data /
evidence (what's so?)



VALUES
(definitions of
quality and
value)



Evaluative
Conclusions (so
what?)

Removes transparency related to judgments of quality and value – which can then be perceived as disempowering, demotivating, disregarding of what's important

An everyday example:

How **valuable** was the last consultation about my son's aspergers?



- My criteria (values) for judging the quality and value of a consultation:
 - The extent to which I have confidence that GPs and specialists are working collaboratively around his care
 - The extent to which I have a clear idea of my son's progress and future options
 - The extent to which Patrick is respected and included in the consultation
 - The extent to which GPs and specialists demonstrate an interest in Patrick's wider life and context
 - The amount of stress involved in seeing specialists and GPs

If the consultation was excellent?

- I would have total confidence that my GP and the specialists were working together, and had full and shared knowledge of Patrick's condition and his developmental progress.
- I would leave the consultation with a thorough understanding of son's progress and feel confident that there were practical future options that I and my family can use and are relevant to us to support his development.
- I would feel that Patrick was being respected and included by everyone, that his feelings and point of view would be taken seriously
- Being able to see the key specialists was a straightforward experience.

My criteria and the data

Evaluative Criteria	The Data	Importance ranking
The extent to which I have confidence GPs and specialists are working collaboratively around his care	The appointment system certainly didn't indicate that there was any formal collaboration, it was clear that prior to the appointment, there had been no contact between specialists, although once together, everyone worked well	1
The extent to which I have a clear idea of my son's progress and future options	The discussion was very productive and it was agreed that using the data from the recent cognitive testing, as well as other best practice, guidelines for Patrick's teachers would be developed	2
The extent to which Patrick is respected and included in the consultation	Patrick was engaged and talkative with the group. The GPs and specialists encouraged him to lead discussion and he reported that he enjoyed the experience	3
The extent to which GPs and specialists demonstrate an interest in Patrick's wider life and context	The group were very supportive of finding ways to translate clinical and psychological findings into everyday language for teachers.	4
The amount of stress involved in seeing specialists and GPs	This has not changed since we have been in the system. This requires my organisation for the consultation to work effectively	5

What was the value / how good was the appointment ?

Overall = Pretty Good

Criteria	Awful	Mediocre	OK	Pretty Good	Great	
The extent to which I have confidence GPs and specialists are working collaboratively around his care						Extremely Important
The extent to which I have a clear idea of my son's progress and future options						Very important
The extent to which Patrick is respected and included in the consultation						Important
The extent to which GPs and specialists demonstrate an interest in Patrick's wider life and context						Somewhat important
The amount of stress involved in seeing specialists and GPs						Not so important

Group exercise – creating rubrics, making evaluative judgements

In groups:

1. In your groups, decide what are the 3 key attributes that you would use to judge the quality and value of a chocolate chip cookie.
2. Then, develop a rating system for what excellent, very good / good, adequate and poor would look like for each of these attributes
3. Taste, look at, and touch the cookies
4. Which cookie is best?

A service level example – what does ‘good’ peer support look like in practice?

See www.wellink.org.nz/KWWreports20102402.htm

The criteria developed from literature and together with the organisation included:

- Effective and appropriate client (guest) engagement
- Peer support workers are able to provide a climate and context which assists guest recovery
- Peer support workers have the skills and attitudes to assist guest recovery
- Effective and appropriate management of peer support teamwork

Rubrics allowed for transparent synthesis of quant and qual data

Rating	Quantitative data	Qualitative data
Excellent: (Always)	90% or more agree with statement	Clear example of exemplary performance or best practice in this domain: no weaknesses
Very good: (Almost Always)	80% - 90% agree with statement	Very good to excellent performance on virtually all aspects; storing overall but not exemplary; no weaknesses of any real consequence
Good: (Mostly, with some exceptions)	60% - 80% agree with statement and no more than 15% disagree	Reasonably good performance overall; might have a few slight weaknesses but nothing serious.
Adequate: (Sometimes, with quite a few exceptions)	40% - 60% agree with and no more than 15% disagree	Fair performance, some serious, but non fatal weaknesses on a few aspects
Poor: Never (or occasionally with clear weaknesses evident)	Less than 40% or more agree with statement	Clear evidence of unsatisfactory functioning; serious weaknesses across the board on crucial aspects

Snapshot of the quality of the peer support service

	Ratings				
	Poor	Adequate	Good	Very good	Excellent
Overall rating					
Effective and appropriate client (guest) engagement					
Peer workers are able to provide a climate and context which assists guest recovery					
Peer workers have the skills and attitudes to assist guest recovery					
Effective and appropriate management of peer support teamwork					

Group exercise – making our values visible

A local community trust has the following goals:

To make a positive difference in our community by:

- helping to reduce poverty
- contributing to community social and educational revival
- supporting families to provide safe environments
- Helping young people realise their potential

Question: If this trust was wildly successful, what would you *see* happening in this community?

Your Task: On the worksheet, build a 'rich description' of success

Evaluative rubrics (E.J. Davidson 2010)

- Really versatile – they work well for:
 - swift and clean or in-depth analysis
 - qualitative, quantitative or mixed methods
- Serious about values - perfect for ensuring consumers, community, cultural & organisational values/aspirations incorporated – take account of ‘the intangibles’
- Implementing them helps build shared understanding of what constitutes ‘effectiveness’ or ‘goodness’
- Creates energy and commitment for engaging with data
- Help organisations identify multiple levels of performance and progress, on many dimensions
- Can be used at all levels of the system

Wrap Up

- Wouldn't it be great if....
- What I must do is....
- What I feel is...
- What I'm clear about is....

Thank you

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Acknowledgements

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