Evaluation & Learning

Data collection, analysis and meaning making should be conducted in partnership with communities, using accessible, culturally appropriate metrics and learning methods.

Introduction

Evaluation is an approach and methodology used to measure progress and assess the impact of programs, initiatives and/or partnerships. Evaluation can involve a host of activities, such as gathering feedback from participants of an after-school program, assessing the health outcomes of cash payment recipients or collecting survey data from attendees of a training.

Learning represents the ongoing process of using evaluation (and other data) to make decisions for the future.

Tools for equity

Equitable evaluation principles

Equitable evaluation seeks to understand the impact of the work, to support (rather than critique) programmatic efforts, and to help gather data from a wide range of stakeholders.

This includes a commitment to three principles
1. Production, consumption and management of evaluation and evaluative work should hold at its core a responsibility to advance progress towards equity
2. Evaluative work should be designed and implemented to be multiculturally valid and oriented toward participant ownership
3. Evaluative work should address the historical and contemporary drivers of inequity and the cultural context in which they exist

Sources
Center for Evaluation Innovation
Equitable Evaluation Framework

Evaluation approaches

Key Considerations
- Gather input from grantees or groups affected by inequities, in evaluation approaches, data collected, and in defining what constitutes success
- Allow grantees or the communities they serve an opportunity to make decisions about how to move forward
- Avoid reductive data or simplified dashboards that hide context, differential outcomes, and historical and structural drivers of inequities
- Ensure that evaluation budgets adequately support time needed for relationship building, appropriate testing of culturally competent instruments, or participatory planning, data collection and interpretation, and sharing of lessons
- Equitable evaluation requires critical thought about all aspects of the evaluative process, including the questions asked, the methods used, the teams assembled and the ways in which data and sense-making are supported

An important tool for gathering actionable data is a client or user survey. Listen4Good has developed a customizable survey template, which your organization can refine to connect with grantees and recipients. Consider conducting both anonymous and non-anonymous surveys to understand the true experiences of clients to elevate improvements in programming and stronger, more authentic connections with intended beneficiaries.

Importance of learning
To meet their mission, provide effective programming and support the communities they work in, organizations need robust learning capacities.

Limited resources (such as funding, talent or time), misaligned incentives for impact, and biases in funding can all hinder the kind of methodical learning that is needed to achieve impact at scale. More organizations, and especially POC-led organizations, should receive adequate resources to build internal capacity to pursue learning and efficacy.

Keys to effective learning

1. Experiment, test and refine programmatic approaches based on evidence, feedback and clear metrics
2. Write down and codify the model to determine which elements can and must be replicated, guided by data and metrics, and develop "proof points" to show significant impact with chosen populations or target areas
3. With clarity on effectiveness and replication, develop plans for expansion, replication, and/or dissemination, built on strengths of the refined model and additional organizational capacity needed to support scaling

Sources

Public Equity Group
Efficacy before Scale