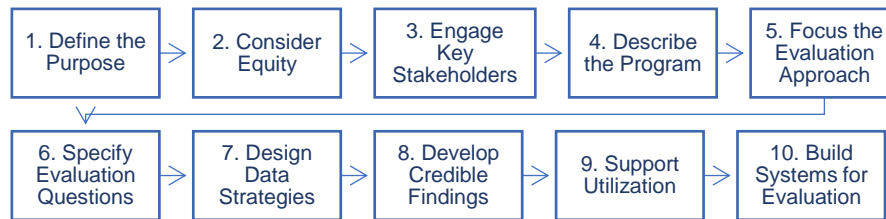# Streamlining Program Evaluation

Most nonprofits engage in some form of **program evaluation** to learn, improve, and demonstrate value to stakeholders. But it can be challenging to conduct program evaluations that are both useful and feasible given competing priorities and resource constraints.

At CHS we specialize in helping organizations design **streamlined program evaluations** that produce useful results at an affordable cost. In this strategy checklist, we offer a stepwise approach for streamlining program evaluation. The suggested use is to review the checklist and consider the possibilities for streamlining program evaluation in your organization or community. The CHS team is available to help as needed with guidance and consulting support.

1. Define the Purpose	→	2. Consider Equity	→	3. Engage Key Stakeholders	→	4. Describe the Program	→	5. Focus the Evaluation Approach
6. Specify Evaluation Questions	→	7. Design Data Strategies	→	8. Develop Credible Findings	→	9. Support Utilization	→	10. Build Systems for Evaluation

1 Define the Purpose

Clarity of purpose early in the process is essential for streamlining program evaluation. The list below shows a set of possible reasons for conducting a program evaluation. Scan the list and check each purpose that applies in your situation.

- ☐ To assure the program is effectively designed.
- ☐ To assure the program is efficiently implemented.
- ☐ To determine how the program is impacting individual outcomes.
- ☐ To determine how the program is impacting the community.
- ☐ To identify opportunities for improvement.
- ☐ To justify the need for further funding and support.
- ☐ Other (describe)

2 Consider Equity

Equity matters in any community program intended to serve a diverse population. As a streamlining strategy it is better to consider equity early in the process rather than later after all of the data have been collected. Consider equity factors when making decisions about the evaluation in **Steps 3-10** that follow.

- ☐ Be inclusive and consider diversity when engaging key stakeholders (Step 3).
- ☐ Consider equity when describing the program and focusing the evaluation approach (Steps 4-5).
- ☐ Consider equity when specifying evaluation questions, designing data strategies, developing findings, and supporting utilization of the evaluation results (Steps 6-9).
- ☐ Consider equity when building data systems to support ongoing evaluation (Step 10).

3 Engage Key Stakeholders

Every program evaluation has key stakeholders who should be involved in designing the evaluation, informing the evaluation, or using evaluation results. You can streamline the evaluation process by identifying key stakeholders early in the process, and designing the evaluation with their needs and interests in mind. Which stakeholders should be engaged in your evaluation?

- ☐ People served or affected by the program.
- ☐ Managers, staff, and volunteers involved in program operations.
- ☐ Board members.
- ☐ Community partners that support the program.
- ☐ Community groups with an interest in the program.
- ☐ Organizations that fund the program.
- ☐ Public officials with an interest in the program.
- ☐ Other (describe)

4   Describe the Program

An efficient program description is fundamental for designing a streamlined evaluation. You can streamline the process by answering each of these questions to produce a brief one-or-two page program description.

- ☐ What is the mission or purpose of the program?
- ☐ Who is the program intended to serve?
- ☐ What inputs or resources are necessary to operate the program?
- ☐ What are the key activities, services, or supports the program will facilitate?
- ☐ How many people will the program engage or serve?
- ☐ What individual outcomes is the program designed to support?
- ☐ What community impacts is the program designed to support?

5   Focus the Evaluation Approach

One key for streamlining program evaluation is to focus on evaluating what is feasible given the stage of program development. As a decision guide the chart below shows four levels of evaluation, and four stages of program development (planning, startup, early implementation, or full implementation). Note that design and process evaluation should be applied in most program evaluations, but you can streamline the process by only evaluating outcomes and impacts if the program is in the full implementation stage. Use the chart as a guide to decide which evaluation approaches you should use based on the stage of your program.

Evaluation approach:	Primary purpose:	Apply if the program is in:
Design Evaluation	Assure the program is effectively designed.	Planning, startup, early implementation, or full implementation stage.
Process Evaluation	Assure the program is efficiently implemented.	Startup, early implementation, or full implementation stage.
Outcome Evaluation	Determine how the program is affecting individual outcomes.	Full implementation stage (sometimes earlier on a pilot basis).
Impact Evaluation	Determine how the program is impacting the community.	Full implementation stage (sometimes earlier on a pilot basis).

6   Specify Evaluation Questions

A set of clear and concise evaluation questions can help focus and streamline the process of data collection, analysis, and reporting. The key is to focus on a few evaluation questions you really need to answer rather than develop a long list of questions that might not be of interest to key stakeholders. Below is a list of common evaluation questions you can tailor to fit your situation. Scan the list an select the ones that fit your situation.

- ☐ Is the program logically designed to achieve its purpose?
- ☐ Is the program being implemented with fidelity to the program design?
- ☐ Is the program reaching and serving the people it should?
- ☐ Are people served by the program demonstrating the intended outcomes?
- ☐ Is the program having the intended impact on the community?
- ☐ What is the cost of the program relative to the benefit of the program?
- ☐ Other (describe)

7   Design Data Strategies

With a concise set of evaluation questions in hand, the next step is to identify data sources and methods. Here again a focus on essentials can help streamline the process. Follow these action steps to design the data strategies for your program evaluation.

- ☐ Identify the data sources that will be tapped to answer each evaluation question.
- ☐ Specify the methods that will be used to acquire or collect the data (e.g., record extraction, document reviews, surveys, interviews, observation, other).
- ☐ Specify the methods that will be used to analyze the data (tables, charts, statistics, thematic analysis, other).
- ☐ Create example tables and charts to preview how the analysis will be presented in the evaluation report.
- ☐ Consider whether you have sufficient internal staffing and expertise to collect and analyze the data.
- ☐ Seek outside help or adjust the scope of the analysis to fit available levels of internal staff and expertise.

8   Develop Credible Findings

In conducting any program evaluation, it is essential to generate data and findings in ways that are credible and transparent. You can help assure credibility by assuring early on that the evaluation is designed and conducted to meet the following guidelines.

- ☐ The evaluation is conducted by qualified people who maintained credibility in the evaluation context.
- ☐ The evaluation devotes sufficient attention to the full range of key stakeholders.
- ☐ The evaluation methods were technically sound and appropriate.
- ☐ The evaluation transparently describes the purposes, processes, judgments, and limitations that shape the findings.
- ☐ The evaluation findings are relevant and responsive to the interests of key stakeholders.
- ☐ The evaluation findings are presented transparently and justified by data and logic.

9   Support Utilization of Evaluation Results

Evaluation reporting can be a laborious process if there is no guiding vision for supporting utilization of the results. You can streamline the process by keeping the key stakeholder audiences top of mind as you develop and deliver the evaluation results. You can support utilization of evaluation results by following these guidelines.

- ☐ Report evaluation results using formats and channels appropriate for key stakeholder audiences.
- ☐ Answer questions about the evaluation in a transparent manner that acknowledges both strengths and limitations of the evaluation methods.
- ☐ Suggest practical ways the evaluation results can be used to inform program improvement, organizational strategy, community strategy, and funding proposals.

10   Build Systems for Evaluation

A final way to streamline program evaluation is to build internal systems to support evaluation on an ongoing basis. By embedding evaluation into workflows and data systems, you can collect and analyze data continuously, and reduce the time needed to complete evaluation reports when they come due. Action steps include:

- ☐ Identify any program evaluations to be completed in the next 12-18 months.
- ☐ List the types of data you will need to complete each program evaluation.
- ☐ Identify data elements on the list your organization is already collecting, and clarify roles, responsibilities, and workflows for collecting the data.
- ☐ Identify additional data elements that your organization is not collecting now, but could collect in anticipation of the next program evaluation. Begin a process of clarifying roles, responsibilities, and workflows for collecting the data.
- ☐ Wherever possible, collect evaluation data within existing data systems, and design reports for extracting data sets and data summaries.

Let's talk. At Community Health Solutions we offer 20 years of experience helping people create strong nonprofits and healthier communities. To learn more about our services and supports for program evaluation and more, contact Stephen Horan (CEO) at shoran@chsresults.com or 804.673.0166. Also visit our website at www.chsresults.com.

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