

gmi Evaluation Toolkit



**A set of practical
principles, checklists,
tools and resources
for use in the process
of conducting a simple
Kingdom-based
and contextualized
evaluation for a
ministry project
or program**

Serving the global
community with a
Kingdom-based
approach to
evaluation





Welcome to the GMI Evaluation Toolkit!

You may be browsing the material in this toolkit for a variety of reasons. Are you doing an evaluation of your program/project and looking for additional resources? Are you looking for helps to begin an evaluation process? Are you new to the subject of evaluation and simply investigating the discipline and the many resources available?

If you are embarking on an evaluation project, you may be:

- desiring to better serve those to whom the Lord has called you to minister.
- responding to requests from donors.
- needing a report for your partner organizations.

Whatever your purposes, we trust the resources shared here will be of practical help to you. As you navigate through the toolkit there are five sections, one for each of five phases of the program evaluation process:

- Plans
- Outcomes
- Instruments
- Data
- Reports

In each of the five sections you will find helps such as principles, checklists, tools/ templates, and resources. If you already have a basic experience and understanding of evaluation, you will find these helps useful without further explanation.

Our underlying intention is that this toolkit will offer you helps in your evaluation process that are simple, Kingdom-based and contextualizable. We have attempted to use standard, professional evaluative understandings and techniques (which are defined in the Glossary) while presenting them with a Kingdom-mindset. The file titled GMI Evaluation - Kingdom Values outlines GMI's approach in doing evaluation with Kingdom values at heart. If you are interested in a more in-depth discussion of this topic, please check out the webinar available on the "Connections tab" at gmi.org/.

Thank you for checking out the GMI Evaluation Toolkit. We trust the understandings and tools you will find here help you and your organization to become more effective in



reaching your vision and mission. That is mission fulfillment for GMI. Please contact us if there is any way in which we can be of help to you. Our role in coming alongside you can take various forms depending on your needs: encouraging and connecting, training and tools, and evaluation services.

May you sense God's blessing as you seek to assess the effectiveness of your ministry. It is our desire that in doing so, you will be enabled to increase the impact of the vision that He has given to you. May the Lord guide and bless you in this process, and may His Kingdom increase as we make informed, Spirit-led decisions to direct our ways!



GMI Evaluation - Kingdom Values

GMI has invested significant time thinking and discussing the Kingdom values that support and inform ministry evaluation. We have come to focus on three values in particular:

Kingdom Values

Three central kingdom values	Nine values related to evaluation	Biblical image
CHANGE – The kingdom is earth-shaking, transformative, liberating, and joyful. This is the kingdom humanity has been waiting for since Eden. This is it!	• Process and outcome both valuable • Transformed lives • Innovation as part of stewardship • Thinking forward from evaluation (goal is to build up not to blame & tear down)	Mark 1:15 The time is fulfilled! The new era is beginning. Change, reorient to the new reality, and welcome the good news.
MYSTERY – The kingdom comes gently, gradually, and mysteriously rather than by force, hurry, or manipulation.	• Celebration of God's work • Dependence on God • Quantitative & qualitative both needed • Thinking forward from evaluation	Mark 4:28 The farmer goes to sleep and gets up, night and day, and the seed sprouts and grows, though he does not know.
UNITY – The kingdom unites people under one Lord rather than feeding their competitive spirit. It is treasonous to evaluate anything in terms of its value for building our own little kingdoms.	• Collaboration not competition • Local context is factored in (unity has diversity not standardization)	Matthew 8:11 I tell you, many will come from the east and west to share the banquet with Abraham, Isaac, and Jacob in the kingdom of heaven.

Change: The Kingdom of God not only *is* but also *is coming*. Change is essential as the Kingdom is more fully announced and people submit more fully to it. We serve in ministry in order to participate in Kingdom advancement. Measuring aspects of its advancement allows us to celebrate what God has done—and rejoice that He has allowed us to participate with Him.

Change varies. The harvest may be thirty-fold, or sixty-fold or a hundred-fold. When we measure change, sometimes we learn that things haven't changed as we hoped or anticipated. It may be the nature of the soil, but it could also relate to the actions of the harvester. This leads us to reflect and to learn and, as the Spirit leads, to maintain or adjust our approach.



We also evaluate because the situation around us is changing. The world of ministry is not a laboratory, where conditions can be held constant. New needs, opportunities and threats emerge—for us and for those we serve. Evaluation and assessment helps us to better understand changes to our environment and to the needs of those we serve.

Mystery: The Kingdom of God is understandable but not fully. There is only One who fully understands and reveals. As a result, our ability to evaluate is limited and fallible.

This relates both to the scope of evaluation and our posture as we evaluate. In terms of scope, we should only seek to evaluate what we have been given responsibility for. In terms of posture, we should bathe our evaluation in humility, knowing that “we see in a mirror dimly” and we know only “know in part.”

Sometimes, God takes the initiative to reveal what has been hidden. Often, He reveals in response to requests or in conjunction with our efforts to discover. We approach evaluation prayerfully, asking God to allow us to discover what He has done and is doing.

Unity: Unity is a key value of the Kingdom. The Son is united with the Father and prays for the unity of the disciples. The process of evaluation involves observing, listening and measuring—all of which foster shared understanding. Shared understanding leads to unity in discernment and action. When we agree about what *is* and what *has been*, we are better able to discuss and agree on what *could be*.

Evaluation also requires stating goals—and often stating how those goals are to be achieved, along with what evidence represents progress toward goals. When ministry colleagues work through that process, differences come to light, revealing areas of disunity that may not have been recognized. Once these differences are surfaced, clarity can be sought and unity restored or strengthened.

These values (and others as well) provide solid support for evaluation. In Change there is reason to measure and evaluate progress. In Mystery there are limits and conditions for measuring and evaluating progress. In Unity there is hope that measuring and evaluating progress will be celebrated and built upon.



Glossary of Evaluation Terms

Accountability: Obligation to demonstrate what has been achieved in compliance with agreed rules and standards. This may require a careful, legally defensible, demonstration that work is consistent with the contract.

Activity: A specific action or process undertaken over a specific period of time by an organization to convert resources to products or services to achieve results.

Assessment: A synonym for evaluation.

Assumptions: A proposition that is taken for granted, as if it were true. For projects and programs, assumptions are suppositions about causal linkages that affect the progress or success of the program.

Baseline: Information collected before or at the start of a project or program that provides a basis for planning and/or assessing subsequent progress and impact.

Benchmark: A standard against which results are measured.

Beneficiaries: The individuals, groups, or organizations that benefit from a program.

Best Practices: Methods, approaches, and tools that have been demonstrated to be effective, useful, and replicable.

Bias: The extent to which a measurement, sampling, or analytic method systematically underestimates or overestimates the true value of a variable or attribute.

Case Study: A systematic description and analysis of a single project, program, or activity.

Causality: The relationship between one event (the cause) and another event (the effect) which is the direct consequence (result) of the first.

Conclusion: A judgment based on a synthesis of empirical findings and factual statements.

Construct Validity: The degree of agreement between a theoretical concept and the specific measures used as indicators of the phenomenon.



Content Validity: The degree to which a measure or set of measures adequately represents all facets of the events or activities it is meant to describe.

Counterfactual: A hypothetical statement of what would have happened (or not) had the program not been implemented.

Cost Benefit Analysis: An evaluation of the relationship between program costs and outcomes.

Data: Information collected by a researcher. Data gathered during an evaluation are analyzed to yield findings that serve as the basis for conclusions and recommendations.

Data Collection Methods: Techniques used to identify information sources, collect information, and minimize bias during an evaluation.

Effect: Intended or unintended change due directly or indirectly to an intervention (related terms: results, outcomes).

Effectiveness: The extent to which a project or program attains its major outcomes.

Efficiency: A measure of how cost-effectively resources/inputs (funds, expertise, time etc.) are used to achieve results.

Evaluation: A systematic and objective assessment of an on-going or completed project or program. Evaluations are undertaken to (a) improve the performance of existing interventions or policies, (b) assess their effects and impacts, and (c) inform decisions about future programming. Evaluations are formal analytical projects involving systematic collection and analysis of qualitative and quantitative information.

Evaluation Design: The methodology selected for collecting and analyzing data in order to reach defensible conclusions about program or project efficiency and effectiveness.

External Evaluation: The evaluation of a program conducted by entities and/or individuals which is not directly related to the implementing organization.

Findings: Factual statements about a project or program which are based on observable evidence. Findings include statements and visual representations of the data, but not interpretations, judgments or conclusions about what the findings mean or imply.

Focus Group: A group of people convened for the purpose of obtaining perceptions or opinions, suggesting ideas, or recommending actions. A focus group is a method of



collecting information for the evaluation process that relies on the particular dynamic of group settings.

Formative Evaluation: An evaluation conducted during the course of project implementation with the aim of improving performance during the implementation phase. (sometimes called process evaluation).

Impact: A result or effect that is caused by or attributable to a project or program. Impact is often used to refer to higher level effects of a program that occur in the medium or long term. Impact can be intended or unintended, as well as positive or negative.

Impact Evaluation: A systematic study of the change that can be attributed to a particular project or program.

Independent Evaluation: An evaluation carried out by entities and persons not directly involved in the design or implementation of a project or program. It is characterized by full access to information and by full autonomy in carrying out investigations and reporting findings.

Indicator: Quantitative or qualitative factor that provides a reliable way to measure a particular outcome.

Inputs: Resources provided for program implementation. Examples are money, staff, time, facilities, equipment, etc.

Internal Evaluation: Evaluation conducted by those who are implementing and/or managing the intervention or program (sometimes called self-evaluation).

Internal Validity: The degree to which conclusions about causal linkages are appropriately supported by the evidence collected

Kingdom Values: Biblical values that support and inform ministry evaluation

Lessons Learned: Generalizations based on evaluation findings that derive from the specific circumstances and may be generalizable to broader situations. Frequently, lessons highlight strengths or weaknesses in preparation, design, and implementation that affect performance, outcome and impact.

Logic Model: A logic model, often a visual representation, provides a road map showing the sequence of related events connecting the need for a planned program with the programs' desired outcomes and impact.



Measurement: A procedure for assigning a number to an observed object or event.

Meta-Evaluation: A systematic and objective assessment that combines findings and recommendations from a series of separate evaluations.

Mid-term Evaluation: Evaluations performed towards the midpoint of program or project implementation.

Mixed Methods: Use of both quantitative and qualitative methods of data collection in an evaluation.

Monitoring: The assessment and analysis of routine measurements to detect changes in status. Monitoring is used to inform managers about the progress of an ongoing intervention or program, and to detect problems that may be able to be addressed through corrective actions.

Objective: A statement of the condition or state one expects to achieve.

Outcome: A results or effect that is caused by or attributable to the project or program. Outcome is often used to refer to more immediate and intended effects. Related terms: result, effect.

Outcome Evaluation: This form of evaluation assesses the extent to which a program achieves its outcomes. It focuses on outcomes (including unintended effects) to judge program effectiveness but may also assess program processes to understand how outcomes are produced.

Outputs: The products, goods, and services which result from an intervention.

Participatory Evaluation: An evaluation in which managers, implementing staff and beneficiaries work together with an external evaluator to choose a research design, collect data, and report findings.

Performance Indicator: A particular characteristic or dimension used to measure intended changes. Performance indicators are used to observe progress and to measure actual results compared to expected results

Primary Data: Information collected directly by the researcher (or assistants), rather than culled from secondary sources (data collected by others). In program evaluation, it refers to the information gathered directly by an evaluator to inform an evaluation.



Program: A set of activities or projects that are typically implemented by several people over a specified period of time and may cut across sectors, themes and/or geographic areas.

Program Evaluation: Evaluation of a set of activities designed to attain specific global, regional, or country development objectives.

Project: A time-bound activity implemented by an organization to achieve specific objectives within specified resources and implementation schedules. A set of projects make up the portfolio of a program.

Project Evaluation: An evaluation of an activity designed to achieve specific objectives within specified resources and implementation schedules, often within the framework of a broader program.

Qualitative Data: Observations or information expressed using categories (dichotomous, nominal, ordinal) rather than numerical terms.

Quantitative Data: Information that can be expressed in numerical terms, counted, or compared on a scale.

Realities: the need or opportunity which the program seeks to answer; stakeholders' issues needing addressed

Recommendations: Proposals based on findings and conclusions that are aimed at enhancing the effectiveness, quality, or efficiency of an intervention.

Reliability: Consistency or dependability. Data are reliable when the repeated use of the same instrument generates the same results.

Risk Analysis: An analysis or an assessment of factors that affect, or are likely to affect, the successful achievement of an intervention's objectives. It is a systematic process to provide information regarding undesirable consequences based on an analysis of the probabilities and/or expert judgment.

Self-Evaluation: An evaluation by those who are entrusted with the design and implementation of a project or program.

Stakeholders: Entities (governments, agencies, companies, organizations, communities, individuals, etc.) that have a direct or indirect interest in a project or program and their related evaluation.



Summative Evaluation: Evaluation of a program in its later stages or after it has been completed to (a) assess its impact (b) identify the factors that affected its performance (c) assess the sustainability of its results, and (d) draw lessons that may inform other programs.

Survey: Systematic collection of information from a defined population through interviews or questionnaires.

Target Group: The specific individuals, groups, or organizations for whose benefit the intervention is undertaken.

Validity: The extent to which the evaluation measures what it claims to measure and the degree to which that data provides sufficient evidence for the conclusions made by an evaluation.

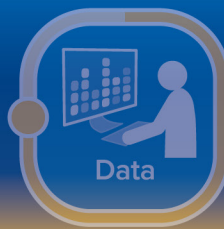
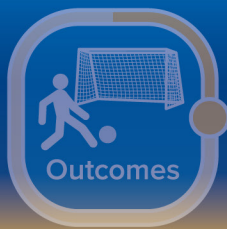
Plans





Identifying Relevant Stakeholders

Types of Stakeholders	Possible Stakeholder Groups	Name of the Stakeholder	How necessary it is to include this person:
			Necessary Important Somewhat important Unimportant
Program Staff	Program Staff		
	Program leadership		
	Others accountable for Program/Project		
Organizational Leadership	Executive director		
	Program manager(s)		
	Board of directors		
	Advisory boards		
	Steering committee		
Program Beneficiaries	Families		
	Youth		
	Children		



Types of Stakeholders	Possible Stakeholder Groups	Name of the Stakeholder	How necessary it is to include this person: Necessary Important Somewhat important Unimportant
Researchers/ Evaluators	Researchers		
	Evaluators		
	Graduate Students		
Volunteers			
Funders	Funders		
	Donors		
	Partner organizations		
Community	Community service groups		



Readiness for an Evaluation Assessment

The first step to take before starting an evaluation project is to ensure that your organization is ready to benefit from the evaluation process and results. This includes the skills and practices of program evaluation as well as the sense of knowing and doing God's will for the future of your organization. The questions in this organizational readiness assessment were created by GMI to help you assess whether your organization is ready to realize the full potential of an evaluation project.

For each of the following, circle the number and word that best represents your opinion about the truth of the statement for your organization:

1. *strongly agree* 2. *agree* 3. *disagree* 4. *disagree strongly*

Biblical Values

Our leaders communicate to staff and donors what the Lord is doing through our projects and programs

1. strongly agree 2. agree 3. disagree 4. disagree strongly

Our organization judges success by standards that are developed with God's Word and ways in mind

1. strongly agree 2. agree 3. disagree 4. disagree strongly

In our organization, success is defined both in how much we do as well as how well we do it

1. strongly agree 2. agree 3. disagree 4. disagree strongly

In our organization, decisions are made after a season of prayer and discernment of God's will

1. strongly agree 2. agree 3. disagree 4. disagree strongly



Leaders

Our leaders communicate to our team a clear ministry vision

1. strongly agree 2. agree 3. disagree 4. disagree strongly

Our leaders inspire others to help carry out our vision

1. strongly agree 2. agree 3. disagree 4. disagree strongly

Our Director /CEO frequently communicates with staff and donors

1. strongly agree 2. agree 3. disagree 4. disagree strongly

Our leaders have good accountability to someone(s) outside their leadership team

1. strongly agree 2. agree 3. disagree 4. disagree strongly

Potential to Create Deep Impact

Our organization has a plan to produce future impact in our community

1. strongly agree 2. agree 3. disagree 4. disagree strongly

Our organization has clearly identified areas of focus

1. strongly agree 2. agree 3. disagree 4. disagree strongly

Our organization works to improve our programs

1. strongly agree 2. agree 3. disagree 4. disagree strongly

Our organization is committed to using the results of this evaluation project to help leaders make decisions for the future

1. strongly agree 2. agree 3. disagree 4. disagree strongly



Staff Experience and Understanding of Evaluation Processes

Our organization has staff that have experience doing project or program evaluation

1. strongly agree 2. agree 3. disagree 4. disagree strongly

Our organization has someone on staff who has done data gathering as part of a project or program evaluation

1. strongly agree 2. agree 3. disagree 4. disagree strongly

Our organization has staff with experience developing data collection tools and collecting data utilizing a variety of strategies

1. strongly agree 2. agree 3. disagree 4. disagree strongly

Our organization has staff that know how to analyze data and draw conclusions from that data

1. strongly agree 2. agree 3. disagree 4. disagree strongly

Organizational Stability

Our organization has a clearly defined structure

1. strongly agree 2. agree 3. disagree 4. disagree strongly

Our organization has maintained the same number or increased the number of employees over the past two years

1. strongly agree 2. agree 3. disagree 4. disagree strongly

Our organization has lost very few leaders in the last year

1. strongly agree 2. agree 3. disagree 4. disagree strongly

Our leaders have identified areas of major organizational risk

1. strongly agree 2. agree 3. disagree 4. disagree strongly



Organizational Commitment to Staff Development

Our leaders spend money for staff training

1. strongly agree 2. agree 3. disagree 4. disagree strongly

Our organization has a plan for training leaders, managers and employees

1. strongly agree 2. agree 3. disagree 4. disagree strongly

Our leaders support staff training by allocating time from the work day for that training

1. strongly agree 2. agree 3. disagree 4. disagree strongly

A specific member of our organization has staff care and training as one of their responsibilities

1. strongly agree 2. agree 3. disagree 4. disagree strongly

Effective Partnership Building

Working with partner organizations is a key approach for our ministries

1. strongly agree 2. agree 3. disagree 4. disagree strongly

In the last two years we have developed at least two partner relationships that have made our ministries more effective

1. strongly agree 2. agree 3. disagree 4. disagree strongly

We have several examples of projects in which our staff have collaborated with other organizations

1. strongly agree 2. agree 3. disagree 4. disagree strongly

Our staff requests feedback from partner organizations with the intention of incorporating that feedback into program improvement

1. strongly agree 2. agree 3. disagree 4. disagree strongly



Culture/Learning Environment

Our leaders use data, information, and evidence in decision-making

1. strongly agree 2. agree 3. disagree 4. disagree strongly

Our leaders build in time for individual and group reflection about services, products, and processes.

1. strongly agree 2. agree 3. disagree 4. disagree strongly

Employees' mistakes are sometimes viewed as opportunities for learning

1. strongly agree 2. agree 3. disagree 4. disagree strongly

Leaders value frank and challenging discussions about the organization and its programs.

1. strongly agree 2. agree 3. disagree 4. disagree strongly

Add up the numbers in each of the 8 sections and write that number to the left of the section. If there is a section in which the score is 12 or more, this assessment is revealing a major area of weakness that will affect the evaluation project. If possible, discuss remedial action in those areas while the evaluation project is in the planning stage.



Questions for the Planning Process for an Evaluation Project

Evaluation Purpose

- What is the purpose of program evaluation?
- What are some reasons that Christian leaders would request a program evaluation?
- What are some reasons that Christian leaders would oppose program evaluation?
- What are your key reasons for initiating an evaluation project?
- Who initiated this evaluation?

Organization Questions

- What kind of organization is requesting an evaluation?
 - What is its mission statement and vision statement?
 - What is their impact statement?
 - If the organization meets its mission – what will happen?
 - Why did they initiate the project which you will review?
 - How critical is the initiated project to the organization's mission and impact?
 - How did they find funding for this project? Internal or External? Did the funding source have requirements?
 - Have they completed a formal evaluation of a project before?
- Are the leaders of this organization actively supporting the evaluation project?

Project/Program Characteristics

- What need does the project to be evaluated address?
 - What did the staff observe that required change or growth?
 - What are the desired results of this project?
 - What are the stated indicators that demonstrate that the project outcome has been achieved?
 - Who are the key stakeholders in the project?
 - What are their roles (active or passive) in making the results (change) happen?
 - Does each stakeholder expect to be part of the program evaluation?
 - Why or why not?



- What would each stakeholder want from the program evaluation?
- Do some stakeholders have different purposes or agendas?
- What resources do each one bring to the success of the project?
- If a program evaluation is helpful/successful, what will it have achieved?



Logic Model with Definitions

Definition: A logic model is a systematic and visual way to identify and understand the relationship of resources that you have to operate the program to the activities and support which are linked to the expected results.

Components:

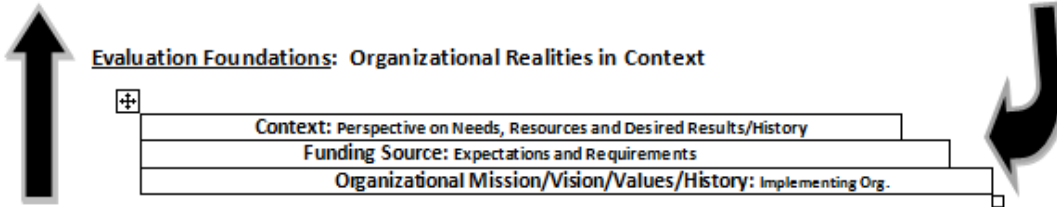
- **Realities:** Understanding the realities of the need or opportunity; stakeholders' issues; having descriptive baseline data, etc.
- **Key Input/Resources:** The resources in people, understanding, influence, and funding that make the program possible.
- **Activities/Services:** The key services or activities that help the recipients to change/grow into the desired results as individuals or as a group.
- **Reinforcing Essential Behaviors:** The critical practices that the people need to put into action to support the end result
- **Leader Supports:** The outside support that helps drive the activities and leaders to the end result as well as the critical practices of the participants that need to be reinforced.
- **Progress Markers:** The milestone that if achieved will steer the program to achieving the desired results and impact.
- **Outcomes/Lagging Indicators:** The major desired outcomes of the program.
- **Impact:** The major difference the program will make, both anticipated and expected



Logic Model

Elements for Program Evaluation

Initiating		Implementation				Summative Evaluation	
Realities: Need: Problem or Opportunity	Key Input/ Resources	Activities/ Services	Re-enforcing Essential Behaviors	Leader Support Practices	Progress Markers/ Monitoring	Outcomes/ Anticipated & Unanticipated	Impact: Anticipated & Unanticipated





Checklist for Planning an Evaluation

Writing an evaluation plan provides you the opportunity to record the steps you will take as you conduct your program evaluation.

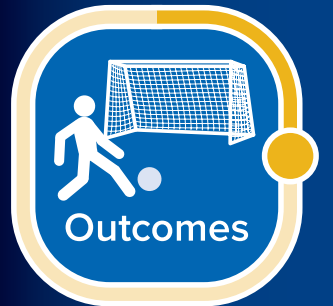
Have you:

- ☐ Conducted a preliminary interview with the organization's leaders?
- ☐ Given prayerful consideration to the evaluation opportunity with organization leaders?
- ☐ Given prayerful consideration of the evaluation opportunity with projected evaluation team?
- ☐ Assessed the readiness for the evaluation project (see Readiness Assessment in this toolkit)?
- ☐ Collected statements of the mission and vision of the organization as well as the program/project to be evaluated?
- ☐ Identified the assumptions which will affect the evaluation project?
- ☐ Assessed the Readiness of partner organizations for the evaluation project?
- ☐ Developed clear objectives of the evaluation project communicated to and approved by organization leadership?
- ☐ Identified and included appropriate Stakeholders* in the Evaluation Project Plan? (see Stakeholder Identification Worksheet)
- ☐ Appointed a Project Manager for the Evaluation Project?
- ☐ Recruited the evaluation team?
- ☐ Presented a timeline and budget to leaders for approval?
- ☐ Defined Staff responsibilities for each evaluation activity?
- ☐ Identified potential barriers and worked (as possible) at addressing them?

*Stakeholder

- All evaluations should have multiple stakeholders
- A stakeholder is any person or group who has an interest in the program being evaluated or in the results of the evaluation
- Stakeholders may include funders, project staff, administrators, project participants or clients, community leaders, collaborating agencies, and others with a direct or even indirect interest in program effectiveness.

Outcomes





Inside and Outside Perspectives: Using Advisors and Contractors Wisely

GMI champions research throughout the mission community. Unlike other kinds of research, evaluation research cannot and should not be fully outsourced. It works best when the organization takes primary responsibility and uses outsiders at strategic intervals. This is often called participatory research.

Occasions when it makes sense to use an external consultant include:

- **When setting up an evaluation program:** There are lots of great resources available online to learn about evaluation (including the Toolkit you are using right now) —so many that you can become awash in possibilities. Coaching from an experienced evaluator can help you assess readiness and design an approach to evaluation and reporting that fits your organization's needs, style and budget.
- **When training staff to do evaluation:** Because evaluation can't be fully outsourced, your organization needs some evaluation-capable staffers to execute program elements and monitor progress. Consider having a consultant assist you in a participative training session.
- **For a big project or program:** Evaluation of large projects can be complex, expensive and time consuming. Hiring an outsider can help keep things on schedule and within budget, while providing an experienced voice. Just remember, as in all evaluation projects, have the evaluation team working from the planning stages of your program.
- **For occasional deep-dives:** With ongoing programs, monitoring can often be managed in house. Every so often, a deeper level of listening and observation is needed. A third party is often helpful.
- **For key stakeholders:** Grant makers want to see your commitment to doing good in-house evaluation. For major projects, however, having an objective, third-party perspective often increases confidence in the results.
- **For sensitive issues:** At certain times and on certain topics, those being served may need someone from outside of the organization to talk to, who has no personal stake in the project. Contractors can deliver third-party confidentiality when needed.



Do's and Don'ts in retaining external evaluation help:

- Don't expect a supplier to submit a full proposal without taking time to discuss the organization's needs and capabilities. On the other hand, do expect to pay for an initial consultation with prospective suppliers prior to receiving a full proposal—an initial meeting to explore ideas and test their fit with your organization is worth the cost.
- Do provide prospective suppliers with examples of your evaluation processes and reports.
- Do ask prospective suppliers how they intend to support and strengthen your organization's ongoing internal evaluation efforts.



Making the Intangible more Tangible

Doing an evaluation project requires an evidence-based approach: collecting evidence, analyzing the evidence, drawing conclusions (synthesizing the evidence), and reporting insights. The stronger the evidence and the more insight gained, the better the case can be made for the effectiveness of the project or program being evaluated. If at the end of the evaluation project, there is not enough evidence to substantiate the projected results, then either the program needs to be reviewed to find out why; or perhaps the wrong indicators were chosen and the outcomes/indicators designation needs revisited.

Here is a simple way to think about evaluating "intangibles" in ministry settings:

- Describe the spiritual change (outcomes) your program is designed to effect, project what change would look like to an outside observer as a result of the program
- Use the list of outcomes, decide on what observable indicators can be agreed on to show that the projected results are being experienced.
- Add an element of quantification (quantitative) when possible, be as concrete as possible in defining the indicators.
- Develop a baseline by applying the indicators to the program beneficiaries before the effort, make sure to record the data for later comparison.
- Include story analysis (qualitative) that provides additional insights not received by other means. The idea is not to prove "empirically" what spiritual impact exists, but to be able to describe it in concrete terms.
- Look for evidence of the Lord's blessing in ways that were not planned for (unexpected results).



Guidelines for Writing Outcomes Statements

When we develop expectations for the program being evaluated, we do so because it is important to know if the results of the activities our program executes were worthwhile or sufficient to justify the effort. If the expectation (called “outcomes” in evaluation research) is too vague, its usefulness in planning evaluation decreases and its worth in helping to guide or direct our activities diminishes.

For example, an outcome might be stated like this: “I resolve to be a better person in the coming year.” When the year comes to a close, your success will, in all likelihood, remain somewhat in doubt. What exactly did you mean by “better”? How much better did you expect to be? Moreover, your resolution provides you with almost no guidance regarding what activities you should be doing to bring about this outcome.

The following four guidelines will help you create outcome statements that are really helpful in finding out the truth about your program:

Specific - To be of real value, our outcome statements need to be as precise as possible. They need to specify clearly what or who it is that your program’s activities and outputs hope to change, and in what direction that change might occur. Most often this will be a change in some behavior or condition that we presume is related to the intended results.

Measurable - For your outcome statements to be a valuable starting point for evaluation they must have measurable indicators. Measurable does not necessarily mean in numbers, many things that are visible are not countable. More specifically, your outcomes must refer to observable indicators of program accomplishment.

Achievable - If your program outcomes and indicators are both specific and measurable, it is worth considering more directly if it is truly practical to expect your program to accomplish the sorts of things suggested in those outcomes. Are your program activities really likely to bring about the kind of change suggested? Many great programs are based on an assumption that is unfounded, and which may never produce the results that are anticipated. Perhaps despite what past experience tells us of the efficacy of our programs, are there factors or barriers that exist in today that may limit or reduce



success? These are questions that you need to ask as you come to conclusions about the results of the program.

Relevant - Imagine drafting outcome statements, laying them out before stakeholders, and having them shrug their shoulders and say "so what?" To be relevant and meaningful, your outcomes and indicators must give you and your stakeholders reason to believe that what comes to be reported as program accomplishments represents changes that are reasonably likely to lead to more important impacts. Outcomes that talk exclusively of the activities that a program hopes to implement and which are not logically linked to the ultimate impact of those outcomes are not helpful in program evaluation.

Time-Limited - Good outcomes should specify a time frame for proposed accomplishments. Many stakeholders may expect to know how long the program is projecting before outcomes emerge. For program managers and staff, specifying a time frame will help to ensure that all stakeholders (donors included) have a shared understanding of what is expected to be done over an indicated time. It is reasonable to call for an accounting of the outcomes proposed at the time indicated in the program plan.



Tips for Choosing Outcomes and Indicators

The key to a successful evaluation project depends on choosing program outcomes and then developing good indicators for each of those outcomes. Here are some tips to help you learn how to develop good outcomes and indicators.

Tips for Developing Outcomes

- To identify outcomes, consider words like: “enhanced ...”, “increased ...”, “more ...”, “new ...”, “altered ...”, etc.
- Note that it can be quite a challenge to identify outcomes for some types of programs, including those that are preventative (health programs, etc.), developmental (faith-related, educational, etc.), or “one-time” or anonymous (relief, food shelves, etc.) in nature. In these cases, it’s fair to give your best shot to outcomes planning and then learn more as you actually apply your outcomes evaluation plan. Also seek help and ideas about outcomes from other nonprofits that provide services similar to yours.
- Programs that are remedial in nature (that is, that are geared to address current and observable problems, such as disease, teen delinquency, etc.) are often easier to associate with outcomes.
- Start with short-term outcomes, then move to intermediate and long-term outcomes
- Regarding identifying short-term outcomes, think 0-6 months:
 - Imagine the beneficiary in the program or a day after leaving the program
 - What changes in character, skills, and understanding does this program intend to develop? What do you actually see?
- Regarding identifying intermediate outcomes, think 3-9 months:
 - Imagine the beneficiary 3-9 months after leaving the program
 - What changes in character, skills, and understanding does this program anticipate? What do you actually see?

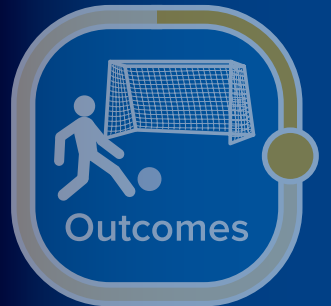


- Regarding long-term outcomes, think 6-12 months:
 - Imagine your beneficiary 6-12 months after leaving the program
 - What impact (values, attitudes, status) would you prefer to be the fullest extent of benefit for the beneficiary and their community? What do you actually see?
- Now “chain” the short-term, intermediate- and long-term outcomes by applying the following sentence to them):
 - "if this short-term occurs, then the intermediate occurs, and if this intermediate occurs, then this long-term occurs" --
- Then think about what causes you to think that each will lead to the next (sometimes called theory of change)
- Most of all, don't worry about getting it perfect – record the reasons from experience, history, and the literature, but also trust your intuition

Tips for Selecting Indicators

- Identify at least one indicator per outcome (note that sometimes indicators are called performance standards)
- When selecting indicators, ask:
 - What would I see, hear, read about in this program that would signify progress toward the outcome?
 - Include numbers and percents regarding visible behaviors when possible , e.g., "2,000 of the participants (50%) of our participants will start reading the Bible by the end of the program" and "3,000 of the participants (75%) of our participants will start reading the Bible one month after the program"
 - If is the first outcomes plan that you've done or the program is just getting started, then don't spend a great deal of time trying to find the perfect numbers and percentages for your indicators

Instruments





Tools for Gathering Information

When we think of monitoring and evaluation, we often assume some sort of survey with lots of questions and “on a scale of 1 to 5” type responses. That may be useful, but let’s not jump too far, too fast. Surveys are helpful, but there are many other tools to consider. Here are a few.

Surveys: Surveys are a convenient way to get information from a lot of people, and in a format that is easy to process. Whether on paper or on the Internet, it can be a very convenient approach. Analysis of survey data, with well-defined questions, can help us discover significant relationships among the respondents, such as differences between the responses based on age, gender, or ethnicity. But surveys presume that we know the right questions to ask, and how to ask those questions. Respondents are forced (other than comment boxes) to answer in limited categories. Surveys tend to offer us a broad understanding of our subject, but not deep insights.

Interviews: Interviews allow us to go into depth and explore reasons why people respond in certain ways. However, because they take much more time to carry out than surveys and analysis is more complicated. Interviews allow respondents to reply in their own words and categories, and even to modify the question asked by the way that they answer. This opens the door to surprising insights, or things we just overlooked. Of course choices need to be made about *who* to interview: a random sample, people known to be leaders or have good insights, or specific sub-groups such as teens who attended an event for the first time.

Focus groups: Focus groups are something like a group interview. It may take the form of a “panel of experts” who are known to offer important insights. Focus groups allow people with a shared experience to talk about that experience. While there is the danger that one or two people will dominate and bias the discussion, there is the opportunity that one person’s comments will trigger responses by others, with deeper insights and explanations agreed to within the group. Many times people will speak up in a group and say things that they would not alone.

Observation: No matter what other approach a researcher might take, knowing through experience who or what is being evaluated is important. Analyzing survey data, or even interviewing people will be much richer for the researcher: listening, watching, feeling



what was going on. And, of course, that will help the researcher make links between comments and responses. But beyond this contribution to evaluation, intentional observation of behavior is an important tool in any evaluation situation.

Historical information: Some projects are entirely based on historical information: past records of an organization, biographies, reports, and other sources. For many monitoring and evaluation projects, historical information (including recent history, records, minutes of meetings, and reports) will be important in setting the context for the current project.



Case Study: What are the best methods for qualitative research?

How do we go about collecting the information we need in order to evaluate a project or program? While we could give some general principles and suggestions, maybe a concrete example to illustrate this would help.

Several years ago a new ministry to teenagers began, TFJ (Teens Following Jesus – remember, this is a fictional name, although based on real experience.) TFJ started small but grew and now hundreds of teens take part in a conference each summer. There is a strong effort to cooperate with the participating churches and to help the conference group leaders keep in touch with the teens and encourage them through the year. It all looks good and many great testimonies have been told. But, the new TFJ leader wondered, how real are the changes? Are kids just having a good time, or are they really growing and changing? They make decisions, but do they keep them? What lasting, positive impact is TFJ having?

The leaders of TFJ want to find the answers. What information do they need to carry out this evaluation? How can they obtain it? How can they analyze it in a way that makes sense?

1. What will we try to find out, and what will we not try to answer?

It is very easy to try to gather too much information, and to get huge amounts of data we can never process. So, to keep this simple, let's define **two core questions we want to answer**:

1. *Did the teenagers have a good time at the TFJ conference?*
2. *Why did teenagers keep, or fail to keep, the commitments they made during the TFJ conference?*

2. Who has the information we need?

- To find out if teens had a good time or not, the teens themselves have the answer. Additional information might be found by talking to small group leaders, parents,



- church youth group leaders, and others. But most of the information we need can be found by asking the teens themselves.
- Why did teens keep or did not keep their commitments? This is a more difficult question to answer. The teens themselves will have a lot of the needed information, but a complete picture will require us to talk to others: youth group leaders of the churches, and others who have contact with the teens both during and after the conference.

3. Are their legal or ethical issues we should consider?

Some countries have strict laws on relating to children and teenagers; and even if the law doesn't affect you, have others check your plans and work to make sure you are not violating any ethical issues with teens. Child protection issues are important! Be sure that the TFJ leadership and the church is in agreement with all of your communication and plans and that with them you agree on how the teens will be approached, the questions asked, and how data will be stored.

4. What is the best way to get the information we need?

Let's think about the possible kinds of tools for finding information: surveys, interviews, focus groups, observation, and historical information.

Did the teens have a good time?

- **Historical information**, such as conference registration, may let us see how the conference has changed over the years and give an idea how many teens come back more than once.
- **Observation** is vital: walking around during the event, hearing the laughter, watching during meals, noting (without being intrusive) people who seem left out or others who appear to be reaching out to lonely kids. Especially if you are not involved in youth ministry, a lot of observation will help you interpret responses to your other sources of information.
- **Focus groups**: perhaps you could get permission to visit with a couple of the small groups during the event, or sit at a meal and ask them what's going on, why (or why not) they are having a good time. This will be a good opportunity to



come up with topics and questions for a survey, themes an adult might easily ignore. And this might be a good chance for surprises to emerge.

- **Interviews:** when it comes to teens, it might be better to stick with focus groups rather than interviews. As an adult, teens may not be likely to tell you the truth about what they really think and why they did or did not have a good time.
- **Survey:** based on the focus groups, a survey could be developed and sent to the teens afterward. Keep it short! Have a few teens check it for you to be sure it makes sense to them. Send it out in a way relevant to teens – whatever social media platform they are using now. Be sure to include an “Is there anything else you want to say or think I should have asked?” type question – often generates some interesting comments.

Why did the teens keep, or not keep, their decisions?

- **Historical information,** such as testimonies or reports from the conference counseling center may give important background.
- **Observation** will help us understand the teens’ responses when they talk about various aspects of the conference.
- **Focus groups:** getting together during the conference with teens who attended in previous years could be a good source of ideas on why teens did, or did not, keep decisions in the past. Asking “third person” indirect questions may help teens speak more freely. Overlapping with the individual interviews noted below, focus groups of small group leaders or others may also be helpful, and time-efficient during a busy conference week.
- **Interviews:** when it comes to teens, it might be better to stick with focus groups rather than interviews. However, the conference may give you the chance for in depth interviews with TJF leaders, prayer and program team staff, counselors, and small group leaders.
- **Survey:** based on the focus groups and interviews, a survey could be developed and sent to the teens afterward to monitor their progress. Consider a study over time: for example, ask the teens the same basic, concise set of questions two or three times over several months. The respondents’ email addresses may serve as an identifier so you can match up answers. In any case,



keep it short! Have a few teens check it for you to be sure it makes sense to them. A focus group of teens near you, who attended TFJ, may help you get the survey right.

5. Pastoral and ethical concerns

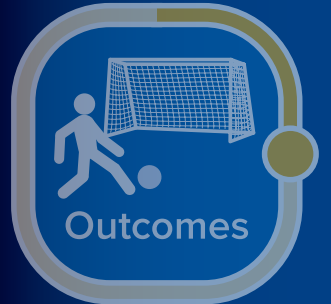
In most research projects the researcher offers the respondents some level of anonymity and/or confidentiality. This is important to getting candid responses. But at times a response almost requires a pastoral response: a teenager who expresses some serious doubts or pain, a broken relationship, or other issue. In such cases, the researcher may feel the need to do something. There is no simple approach, but in the example we are using, the researcher might reply to the respondent, note briefly concern about the comments, and ask if the respondent will talk to an appropriate TJF or church leader or give permission to put her or him in touch with them.



Comparison of Qualitative and Quantitative Evaluation Research

	Qualitative	Quantitative
Strengths	Depth	Breadth
	High conceptual validity	Understanding how widespread a phenomenon is across a population
	Understanding of context and process	Measures of correlation for populations of cases
	Understanding of what causes a phenomenon, linking causes and outcomes	Establishment of probabilistic levels of confidence
	Fostering new hypotheses and new research questions	
Weaknesses	Selection bias may overstate or understate relationships	Conceptual stretching, by grouping together dissimilar cases to get larger samples
	Weak understanding of occurrence in population of phenomena under study	Weak understanding of context, process, and causal mechanisms
	Statistical differences often unknown or unclear	Correlation does not imply causation
	Requires greater investment of staff time and effort	Involves analytical skills uncommon to most staff

Data



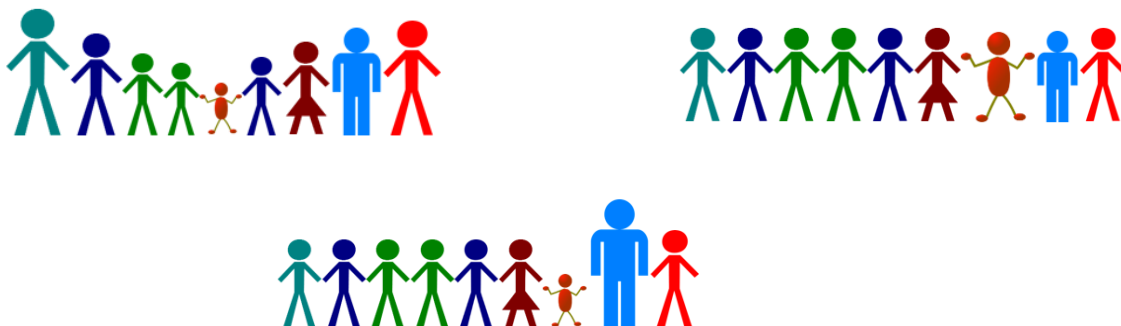


Visual Insights to Help Interpret Data

Some assessment teams are able to draw on the help of people with a strong grasp of statistical analysis and high-level analytical tools. Most of us will have to rely on simpler approaches. We don't need to be afraid (or ashamed) of that, just respond with thoughtful nuance of what we claim to have found.

One common mistake is a failure to understand what our statistical analysis is telling us (or is *not* telling us) and thus to overstate our claims or misinterpret the responses.

Think about a group of people with an average (mean) height of 173 cm or 5'8". In fact, we might find the same average, or mean height for three different groups. The first group picture below might represent a typical family. Picture 2 has a group with the same average height – but if all we know is the average we will miss out reporting that there is an unusually tall baby. And since it seems that the airlines base the space between seats on the average height of passengers, almost all passengers fit, but as picture 3 might suggest, one guy (and those next to him) will be very uncomfortable.

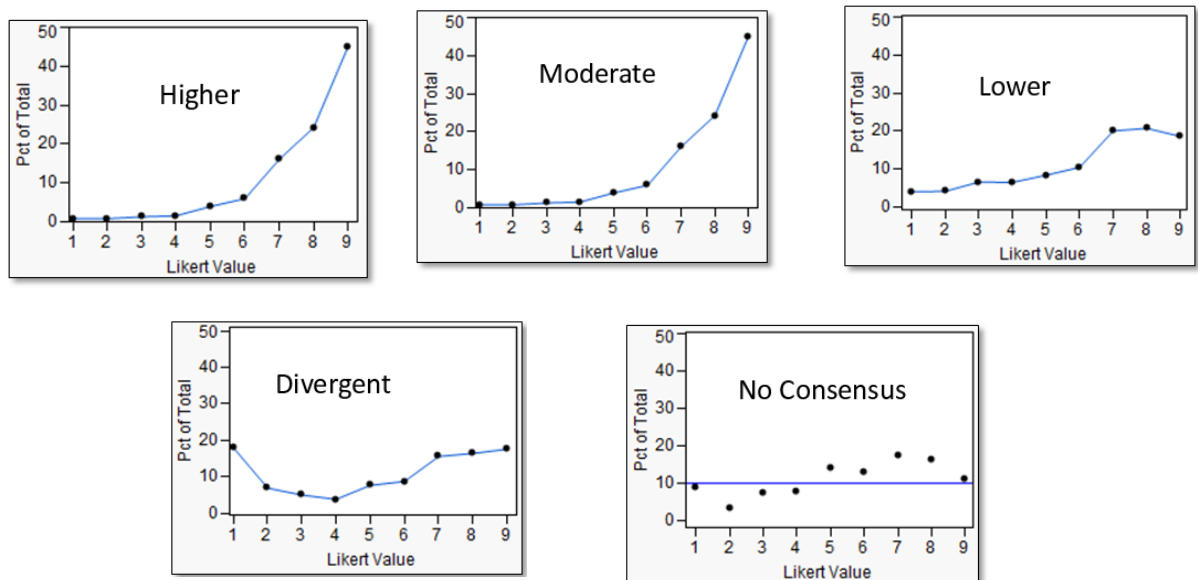


Just as in the case of these groups of people, **taking a look at our data through good charts can help us interpret our data and draw out important insights possibly hidden by routine statistical analysis** (or only understood by people with a head for complicated numbers!).

In a recent study, over 400 individuals were asked to respond to various statements with answers ranging from 1 to 9 indicating no agreement (1) to strong agreement (9). The researchers – all with lots of experience – found it helpful to charts the data, not just rely on statistical computations like means and standard deviations. As they explored the responses to about 100 statements, they came up with five categories of response: three levels of affirmation (higher, moderate, and lower), a “divergent” category”, and “no consensus”.



Beyond information gained from the mean (average) response and other statistical measures, the charts give a visual feel for how strong that affirmation was. The “no consensus” category, like the height example above, may have had about the same mean response, but more or less the same amount of people disagreed with the statement as were lukewarm or were very strongly in favor of the statement. It was only by looking at the charts that the researchers got a good feel for the “divergent” category. On these statements the response was polarized – love it or hate it – and in a sense those issues were far more interesting to explore and explain than the statements more or less everybody agreed with.



These specific categories might not apply directly to other projects. **The point is that while numerical statistical analysis is important, our eyes and intuition are also important. Either one, standing alone, can be deceptive or miss important relationships. Coupled together, our insights along with good data can go much deeper and our explanations be more fruitful.**



Questions to Make Sense of Data

Identifying Findings

Individual Stakeholder groups

- What are the findings for each Stakeholder group?
- Are there common perspectives among the Stakeholders?
- Are there significant discrepancies? What are they? Is there any rationale for discrepancies?

Combined Group findings

- What findings confirmed that the project reached its desired outcomes and impact?
- What findings indicate that the project did not reach its desired outcomes and impact?
- What findings indicate unanticipated results and outcomes? Positive or negative?

Drawing Conclusions

- Did the project reach its desired impact?
- What was the perceived impact?
- If different for different Stakeholders, why the difference?
- Were the desired outcomes reached?
- Were there any unanticipated outcomes? Positive and/or negative?
- Did the Stakeholder group perceive their role in a positive light?
- Were the realities in practice the ones identified at the beginning?
- Did the organization have the correct and adequate resources to meet the program needs in such a way that the outcomes and impact could happen?



- Were the program activities and services relevant and robust enough to produce the desired outcomes and impact?
- Were internal and external supports consistently practiced so that change toward outcomes and impact could happen incrementally?
- Were the right leading indicators identified and re-enforced so that they led over time to the desired outcomes and impact?
- What were the suggestions for improvement from each Stakeholder group?



Data Analysis Checklist

Planning for analysis needs to go hand-in-hand with planning the tools you will use for data gathering. There is no point, for example, in designing a complex survey if you do not know how to analyze it, or collecting dozens of interviews if you will not have the ability to process them.

Big picture analysis questions

- [] What type and level of analysis skills are required to answer the evaluation big-picture questions?
- [] What skills do you have? Your evaluation team? Remember, working as a team with mixed skills will greatly enhance your work.
- [] What resources will make both data gathering and analysis easier for the respondents and you? (For example the survey and analysis tools at [SurveyMonkey.com](https://www.surveymonkey.com))
- [] Be sure to guard your data with secure systems and back-ups of the original data. Work from copies of the data, not the original data files.
- [] What part of your analysis leads to solid, significant findings, and what suggests important insights yet with less analytical rigor? What is important enough to suggest further study?
- [] What are the limitations of validity of your work? Your findings may be true about one setting, but are they necessarily true elsewhere? Even if you cannot state that they are true everywhere, do your findings suggest helpful questions and applications to be considered in other settings?

Getting into the analysis

Whatever analysis tools you will use, “mucking around in the data” is important: you need to take time reading and exploring the responses so that you have a feel for the data, and not just try to run some statistical tests to prove something.

- [] Capture your thoughts! Write things down and come back to them later.



[] As you carry out the analysis, do your findings seem to make sense of the situation? Are your surprises valid, or do they represent a flaw in your process or an unreliable response?

[] In statistical analysis, use a mix of visual and numerical tools. Charts showing a range of responses may help us make sense of statistical output; and statistical output may help us confirm that what our eye detects in a graph is – or is not – truly significant.

[] With interview and similar data, let the stories speak to you. What stands out? Whether on paper or with a computer program, mark data to help you identify key words and themes, and then explore how often and why they seem to emerge.

[] Be thoughtful in selecting examples to quote: a catchy statement or clever insight may be helpful in some ways, but not really be representative, or explanatory of the overall responses.

[] Triangulate; that is, look at the same object from different angles through different approaches of data gathering and analysis. Do your interviews, survey responses, observations, measured and historical records, and other data match up? If not, reconsider your analysis.



Asking the Right Questions for Interviews

The right questions are the ones that will give you insight in regard to the outcomes and indicators you have chosen for the evaluation project.

TEACUP:

Great questions for interviews have six characteristics which give the acronym “TEACUP”:

1. Tolerable
2. Essentially linked to your outcomes and indicators
3. Answerable by the respondent
4. Clear to the respondent
5. Unbiased
6. Penetrating

These criteria operate like links in a chain. If any link breaks, the chain breaks.

Tolerable

An interview is much more stressful for the respondent than the interviewer, especially when a boss is interviewing his employees or a staff person is interviewing the people he/she serves.

Reduce that stress. Though you may have to ask some questions that are a bit threatening, try to keep the threat to a tolerable level. The more relaxed your respondents are, the better your chances to get the kind of insight you hope and pray for.

Unless absolutely necessary, avoid the “Big 3” threatening topics—money, sexual behavior, conflict. If you are in a cross-cultural setting, make sure that the questions you ask do not have overtones or hidden meanings that will make them hard for your respondents to answer truthfully. Avoid questions that may embarrass respondents or cause them to embarrass anyone else. If such questions must be asked at all, do it in the most delicate way possible and as late in the interview as possible, but not at the very end, as if you have at last revealed your “real” question.



Essentially linked to your outcomes and indicator statements

As you begin writing the questions you will ask other people, always ask yourself, *“If my respondents answer this question the way I think they will, how much insight will that give me about my main question?”* That will keep you from drifting into interesting but non-essential matters. You will use very few questions, so make them all highly relevant to the outcomes and indicators you are researching.

Answerable by the respondent

The questions need to be within the respondent’s sphere of knowledge or experience and phrased in ways that fit the respondent’s normal thought pattern. Otherwise the respondent will be intimidated and/or confused, and little insight will come. A respondent always has an easier time describing his/her concrete experience than answering a question that requires some abstract analysis. For example, “How did you begin working with your current employer?” is easier to answer than, “What is the most important thing you look for in an employer before you agree to work for that company?”

A common temptation in questioning is to ask people about the outcomes directly. For example, *“Do your programs accomplish such and such?”* It is often too general or too complex for them to answer. They may never have thought about it. They imagine you are more likely to know the answer than they are, which makes them wonder why you are asking them at all unless you want to embarrass them.

A better approach is to ask smaller questions that are easier to answer. For example, instead of, *“What causes some people to have resistance to participating in this project?”* say, *“Some of the project staff people thought the whole community would like this project because it does such-and-such. But now they are not sure if the people care about that or not. What do you think?”*

Breaking your outcomes and indicators into powerful but answerable small questions is your challenge. Here are three characteristics of answerable questions:

Clear to the respondent

It is easy to write questions that are clear to you, but the real test is whether or not they are clear *to your respondents*. Many researchers do not take this too seriously since they know that in an interview situation, they can always adjust and clarify questions as they go along. It is important to have essentially the same interview questions for all of



those interviewed. If each respondent answers a different question, you will draw totally unreliable conclusions.

The big risk occurs when the respondent seems to understand the question and the researcher sees no need to clarify it. It is still possible that the respondent heard the question very differently than the researcher intended and assumed. For this reason, the questions need to be tested with someone from the group or culture so as to assure that they are hearing the question the way you intend for it to be understood.

Unbiased

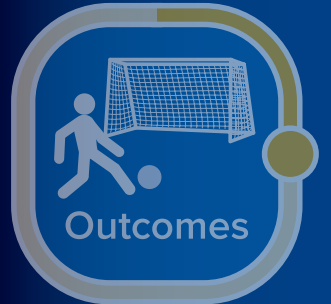
Some of the best insights come from the most unexpected responses, which is why you are required to rely mostly on open questions in your interviews. Questions must not limit the possible answers too much, they must not imply that the researcher is looking for a particular answer, and they must not make assumptions the respondent does not share. Questions which lead the respondent to a particular answer are not helpful in revealing reality.

Penetrating

This is closely related to two of the previous criteria (“essential” and “clear”) yet slightly different. You want meaty, clever, insightful questions, not bland, superficial ones. Question that lead respondents to tell you their stories, to choose, to imagine, perhaps to think deeply (but not too deeply) are those that will reveal the most and lead to insights about the program you are evaluating.

When you think you have the right questions for your evaluation project -- questions meeting all six of the TEACUP criteria, test your questions with one person who is like the people you are going to interview. Then improve them if you can before using them in your actual fieldwork.

Reports





Reporting for Outcomes-based Evaluations

All of the steps in the process of evaluation are important. While the significance of reporting may seem obvious, many times it receives insufficient attention. Without a good report, all the time and energy invested will not be properly represented and shared. To finish well, ask yourself the following questions:

Who will you be reporting to?

Reporting to your organization

- Leaders
- Program leaders/managers
- Board of Directors

Reporting to others outside of your organization

- Donors
- Foundations & major donors
- Government agencies
- Media & the public

How will you present the report?

Reporting to your organization

- Determine who receives the data
- Design report for the audience

Reports for leaders need to be concise

Reports for the program staff need to be detailed

- Keep format standard, recognizable
- Include findings and insights

What did you discover?

What does it mean?



Recommendations are often included

- Make it as exact as your data allows (use decimal points, footnotes, definitions, direct quotes)
- Note exceptions and issues that the evaluation project uncovered

Reporting to organizations outside of your organization

- Create a highly-professional version for donors and foundations

Keep it professional: the report is not a “sales pitch”

Make it accessible, easy to read

- Create a short version for promotional use



Checklist for Reporting Your Evaluation Results

The level and scope of information in report depends for whom the report is intended, e.g., funders, board, staff, leaders, etc. Be sure the organization's ministry staff members have a chance to carefully review and discuss the report before it is sent out.

Report Contents

- ☐ Title Page (name of the organization that is being, or has a program that is being, evaluated; date)
- ☐ Table of Contents
- ☐ Executive Summary (one-page overview of findings/recommendations)
- ☐ Purpose of the Report (what type of evaluation was conducted, what decisions are being aided by the findings of the evaluation, who is making the decisions, etc.)
- ☐ Background about Organization and Program being evaluated
- ☐ Organization's description
- ☐ Description of program that is being evaluated
 - Problem Statement (description of the ministry or community need that is being met by the program)
 - Overall Goal(s) of Program
 - Outcomes and indicators
 - Activities of the Program
- ☐ Overall Evaluation Goals - what questions are being answered by the evaluation
- ☐ Methodology
 - Types of data/information that were collected
 - How data/information were collected (what instruments were used, etc.)
 - How data/information were analyzed



Limitations of the evaluation (cautions about findings and how to use the findings/ conclusions, etc.)

- [] Interpretations and Conclusions (from analysis of the data/information)
- [] Recommendations (regarding the decisions that must be made about the program)
- [] Appendices: content of the appendices depends on the goals of the evaluation report, and can include such things as instruments used to collect data/information, data gathered in the research, testimonials (comments made by users of the program), and case studies of users of the program.



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