Measuring Outcomes & Social Change

By identifying indicators of change early on in the project's development, the stage is set for project monitoring and/or evaluation. Funders, in particular, often want to know how you will measure the social changes you claim your program will achieve. You can measure this change by monitoring your work on an ongoing basis or by evaluating it periodically.

Information gathered in a monitoring or evaluation process is used by:

- program staff – giving the information required for quality control and a feedback loop to identify any modifications needed as the program progresses
- the funder – showing whether funds are being disbursed and used as agreed
- management – identifying the fine-tuning and resources required to achieve the planned outcomes; and
- the board of directors – showing progress toward the outcomes necessary to contribute to the vision of the preferred future identified by the Board.

Continuous Monitoring

The foundation of outcome measurement is program monitoring. The information provided in the monitoring process can also used in program evaluation. Monitoring is assumed in outcome measurement and should be supported by the program budget.

Most of us monitor things without even knowing it. Monitoring is the systematic collection of information on the way the program is being implemented and on the identified outcome indicators. Monitoring provides information to show whether the program is doing what it planned to do, using resources appropriately, and providing the services in the way it had intended. Ideally, it is continuous, providing ongoing feedback to the program staff, management, and the funder. It is not a separate set of activities. A good program manager or coordinator is always monitoring, talking with clients, inviting feedback at staff meetings, consulting with the people the program serves.

Evaluation

Evaluation is a learning tool. It provides you with the opportunity to assess changes that can be attributed to a particular program and determine the relationship between the inputs and activities and these changes. Evaluation is usually undertaken at periodic intervals. It also gives you the opportunity to examine the program against criterion deemed important for that sector. Evaluation requires resources beyond the program budget, perhaps built in with a separate budget line item.

Types of Evaluation

There are different types of evaluations, each giving different information. Two of the most common are:

- Process or Formative Evaluations: These are undertaken to provide information to improve the program as it is being implemented. A formative evaluation focuses on the process for designing and implementing the program as well as a preliminary assessment of outcomes.
- Outcome or Summative Evaluations: These render conclusions about key aspects such as the program outcomes or degree to which objectives are met. It is usually completed at the end of a pre-determined timeframe, comparing identified outcomes with conditions at the beginning of the program.

Participatory Monitoring and Evaluation involves the various levels of stakeholder groups (participants, staff, community members, funders) in designing and collecting information. Optimally, those most affected by the program design the evaluation or monitoring process, gather information, analyze the information, and contribute to the reporting of what was learned. a participatory approach can be applied to any type of evaluation including process and summative evaluations.

Internal vs. External

Evaluation can be internal or external. An internal evaluation means that a staff member (or several staff members) is assigned to conduct an evaluation. An external evaluation is conducted by an evaluator hired to coordinate the evaluation on behalf of the funder or agency. An internal evaluation tends to be less expensive and the information collected is fairly accessible for planning purposes. An internal evaluation is usually highly responsive to program needs. The program already knows the program well. An external evaluation is usually more costly, but it offers a measure of independence and a fresh source of insight. Joint internal-external evaluations take advantage of the strengths that both an internal and external evaluator bring to the table.

When selecting an external evaluator, it is important to consider the following:

- Does this individual or group have experience with our target group?
- How much evaluation experience do they have?
- Will they be able to communicate effectively?
- Will this group work effectively with staff?
- How creative are they in designing appropriate approaches for the target group?
- How will they use the resources available?
- Do they write concisely, professionally, and in a way that is user friendly?

Preparing a Plan

The preparation of a monitoring and evaluation plan helps you explore how you will collect data on the indicators that you have identified for each outcome.

The plan should provide detail on the questions to explore, methods you use to gather information, where you will get the information, who will gather it, and how often. Some considerations for designing the plan are:

- Are the methods appropriate for the source?
- Can the method be systematically applied?
- Are there opportunities for a range of structure/non-structured methods?
- Can the information be gathered in an age or culturally appropriate way?
- Is the language simple and clear?
- Can this information be gathered in a more participant friendly way?
- Do you have the resources to complete this plan?

Choosing a Method of Information Gathering

Some information gathering methods work well for quantitative indicators and others for qualitative. It is best to use both so that a full picture of the project is presented. You can also combine methods and be creative. It is important to collect data that will have meaning for your organization.

Interviews, Surveys and Questionnaires

What these three terms have in common is that they involve a series of questions to explore an individual's experiences, opinions, and ideas. The individual being interviewed or surveyed is often referred to as a 'respondent.' Interviews are questions asked in person. Surveys and questionnaires are usually filled out by the respondent in their own time. Surveys and questionnaires can include:

- workshop feedback forms
- telephone surveys
- mail-out surveys
- electronic questionnaires

Questions in interviews, surveys and questionnaires can be asked in different ways, including the following:

Informal conversations: such as at the agency coffee room with colleagues; or in the school yard with parents dropping off their children. For informal conversations to be a valid way of collecting data, you need to advise the person you are talking with what you are using his/her ideas for. These conversations need to be approached in a systematically random way such as 'talking to every fourth person who walks through the door.'

Guided interviews: where your questions are fixed. This helps you collect comparable information - especially important if you have different people conducting interviews. Questions could include: What community centre activities are you involved in? What skills did you learn in this project that you can use in your everyday life?

Closed, fixed choice questions: Where you offer statements and the respondent indicates the level to which they agree or disagree with the statement.

Standardized open-ended questions: These ask the respondent for their opinion, without any response from the interviewer or hints in the survey. How would you describe the situation of refugees in your community? What kinds of community centre activities are you involved in? What skills did you learn in this project that you can use in your everyday life?

You can be creative with questionnaires but be sure to adapt the questions to the language skills or culture of the group being surveyed. Examples of creative questionnaires are:

- using happy/sad faces to indicate a continuum of satisfaction with aspects of a service, and,
- facilitate participants through a sociogram where they are asked to physically place themselves in the room according to how they want to answer the question.

Response rates for written and telephone questionnaires are usually not as high as with face-to-face methods.

Observation

This method does not involve any direct questions, you are just collecting data or stories. Some examples are: observed behavior changes, checklists or frequency counts done by project staff or volunteers, oral histories or anecdotal information. If you are using an individual's story that they talked about in a group, be sure to get their permission to document it.

TIP

Writing Questions

What to Look For

- Questions related to indicator
- Clear, very plain language
- Ways to get meaningful information
- Diversity of perspectives
- Gathering information in way that is easy for respondents

What to Avoid

- Obvious Bias
- Multiple questions
- Leading questions
- Yes/no questions
- Technical language
- Invading privacy

TIP

Gathering data does not have to be a separate activity that everyone dreads. Work it into the Activities you're already doing, which might even help you achieve the Outcomes you are looking for.

"Not everything that counts can be counted.

And not everything that can be counted, counts."

- Albert Einstein

Documents/Records

This involves gathering the information you need from existing documents such as participant diaries, organizational logs, test scores, literature searches, minutes from meetings, statistics from government departments and reports.

Focus Groups

A sample or portion of participants is brought together for a discussion. You are not building a consensus, you are simply trying to understand the range and depth of opinion on a few choice questions. Make sure you have someone to record what people say.

Gathering Information through Art

You can collect very useful information by inviting participants before the program begins and after the program ends to demonstrate their experience with an issue in a creative way. They may choose to demonstrate the change they experienced through a video, diagram, song or a play.

Gathering Information on Change

It is now time to implement the information gathering plan. You do not have to gather everyone's feedback, nor do you need to have information on everything thing that happened. What you are doing by measuring change is:

- drawing information about the program from a 'sample' of participants who best represent the diversity of experiences and views, and
- comparing participant experiences and views at the beginning of the program (baseline) with their experiences and views after they have participated for a period of time in order to see if there is, indeed, a 'change.'

Once you have selected a representative sample and established the conditions at the beginning of the program, you will collect information on an ongoing basis, analyze it and report it in appropriate ways.

Sampling

It is not always possible to conduct a survey of a whole group. When a group is too large, you can select a "sample", a smaller selection of individuals thought to be representative of that population. A sample does not require as much staff or volunteer time for collection, but can still provide reliable information.

The bigger your sample, the more reliable your information. For example:

Three people's responses may give you a skewed impression of how 100 people feel, whereas responses from 25 will yield a more accurate picture.

Sampling can be used for most methods of information gathering. For example:

Instead of asking every community resident to comment on street involved youth sleeping in front of businesses, the project team fans out in the community and each asks 30 people randomly, including: shopkeepers, people on nearby streets getting into their parked cars and people crossing the park. The sample group should include men and women of all age groups and from all backgrounds and ethno-racial groups.

Many different kinds of sampling techniques have been developed and it is important to find the method that is most appropriate for your organization. For information about sampling techniques and tools, visit Lancaster University's Statistics Glossary at www.cas.lancs.ac.uk/glossary_v1.1/main.html and http://www.surveysystem.com/sscalc.htm

Establishing a Baseline

Once you have determined what your data sample will be, a baseline (also called pre and post testing) is established.

A baseline gives information about conditions before the project begins so that you have something to compare your results to. This is how you will demonstrate that there has been a change. The baseline uses the same sample selection process that will be used in information gathering throughout the project. This makes an actual comparison possible (i.e. apples are compared with apples and not oranges).

If it is not possible to establish a baseline, a second best option is to ask "before-after" questions when meeting people who participated in the project. That way you can capture the difference the project might have made.

Collecting Information

Once a baseline has been established, change information is collected on each indicator identified in the Outcomes Measurement Framework. The data is collected using a wide range of information gathering methods such as those described earlier in this guide.

Collecting information can sometimes be tedious and, with other pressures an organization is experiencing, is often the first activity to be sidelined. Some suggestions of how to collect information with relative ease include:

- be relaxed and remember this is not the focus of your work.
- consider that you are building internal capacity - that the information you are gathering will help your organization be stronger.
- involve volunteers so that they too build skills and get a sense of contribution.
- help staff learn tools and strategies – formal and informal – for information gathering so that they can design and implement information gathering in their own ways.
- build information gathering into design of program activities.
- use the information regularly in both formal and informal ways, such as in management meetings, activity briefings or debriefings.

Appendix 2 provides an example of a completed plan. Tool 11 walks through the steps of selecting information gathering systems. Tool 12 is a worksheet for creating a Monitoring Plan. Tool 13 provides assistance with preparing these instruments.

Example

Creating a Monitoring Plan

Short Term Outcomes	INDICATORS
Volunteer and Youth Advisory Programs are designed as empowering and youth focused.	• Degree to which the activities, partnerships, manuals, and committee protocols are youth oriented
Youth participants have new knowledge, skills and confidence to support other youth seeking program resources.	• % of participant youth who describe new knowledge and skills geared to supporting youth peers. • % of participant youth who demonstrate increased confidence in abilities to perform identified tasks.
A core of competent volunteers is deployed; they support BYRC programs and gain further personal development.	• % of trained volunteers who are deployed to BYRC and community programs. • % of trained volunteers are able to independently perform their tasks.
Youth gain knowledge, skills and experience in negotiating, consensus building and recognizing Obstacles in relation to decision-making.	• % of youth who understand communication requirements and recognize obstacles to decision-making.

Intermediate Outcomes	INDICATORS
Personal Growth Youth integrate the knowledge and skills learned through their volunteer activities into their daily lives, making informed and healthy lifestyle decisions.	• Degree to which participants can describe situations where they made more informed and healthy decisions than they might have before they participated in the program.
BYRC Approach The BYRC routinely engages young people in design, implementation, and evaluation of centre programming.	• # and type of roles fulfilled and work done by youth volunteers • Degree to which program participants describe the youth centred approach of the Centre.
Youth in Community Youth use their new knowledge and skills volunteering, or in paid positions within their community.	• % of at-risk youth who volunteer or are employed in the community on an ongoing basis.

INFORMATION SOURCES	COLLECTION METHODS AND FREQUENCY	PERSONS/GROUP TO DO THE WORK
• Program plans, manuals, committee structures	• Document review once per year	• Youth volunteer
• Participants • Participants records	• Workshop Feedback Form • Review of records twice per year	• Workshop facilitator • Program Co-ordinator
• Participants records	• Review of records twice per year	• Workshop facilitator • Program Co-ordinator
• Participants	• Workshop Feedback Form	• Workshop facilitator • Program Co-ordinator

INFORMATION SOURCES	COLLECTION METHODS AND FREQUENCY	PERSONS/GROUP TO DO THE WORK
• Participants	• Participant survey twice per year	• Program Co-ordinator
• Volunteer log • Participants	• Review of log twice per year • Participant survey twice per year	• Program Co-ordinator
• Community organization	• Agency survey once per year	• Program Co-ordinator

Tool 11

Assembling a Monitoring Plan

Purpose

To help your group to collect the information needed to measure your project outcomes.

Description

This tool provides an overview of the elements of a monitoring plan and then presents a series of suggestions or questions to consider for each of these elements. It will help you decide on data sources and appropriate data collection methods for your project. It also discusses the research issues you will need to consider.

When to Use

- At the beginning of any new project, once you have development your outcome measurement framework and indicators.
- As a review when you are ready to begin collecting data
- After your group has gone through one round of data gathering and analysis and you want to improve on your data collection process.

How to Use

In Step 1, review the table of data collection plan elements.

In Step 2, for each set of indicators (corresponding to an outcome statement), think about where, or from whom, you will be able to get the information your group will need. Think through the questions about logistics and sampling before you make any final decisions about appropriate sources.

Be sure to investigate and conform to the requirements of the Personal Information Protection and Electronic Documents Act, which governs the management of personal information for organizations and businesses in Canada. In Alberta, your group will also need to comply with the provisions of the Personal Information Protection Act. Websites for both of these are provided in Useful Resources on page 95?.

In Step 3, review the list of group characteristics and possible constraints you may face when collecting data from people. Check those that may apply, and use them to stimulate your thinking about any other constraints that may exist. Have these in mind when you review the list of possible data collection methods, and their advantages and disadvantages. Check those that you could use or adapt for your project.

In Step 4, you may want to use the Tool 5 worksheet template provided, or start a chart on flipchart paper. Work through all the columns in the data collection plan with your group.

Step 1: Review the Elements of a Monitoring Plan

You have already developed your indicators, so you are now ready to develop a plan for data collection.

Review the chart on page 7-9, which sets out the following elements of a Monitoring Plan:

- Outcome statements
- Indicators
- Data sources
- Collection methods and frequency of collection
- Who collects, sorts, and compiles
- Who analyzes
- When analyzed

Usually, your data collection is linked to three stages:

- **Baseline**
  Ideally, you should have an idea of conditions at the start of your project — a baseline to which you can compare the changes that have occurred since then. It is easier to establish a baseline if you gather information at the very beginning of your project. However, if there is no documented information from before the project began, you can ask before-and-after questions to gather people's opinions on the changes the project has made.

- **Monitoring**
  You will be collecting data regularly during the course of your project. This data will help you to understand what is happening in your project, so that you can make any necessary adjustments to achieve your outcomes. Regular monitoring will provide essential information to include in your reports to funders and other stakeholders.

- **Evaluation**
  In more complex and long projects, you might gather information in the middle of the project for a mid-term evaluation (process). Then, as the project winds up, you might conduct a final evaluation (summative). Evaluations can be done internally, although they are also carried out jointly, or completely with outside evaluators.

Elements of a Monitoring Plan

Outcome Statements	Insert outcome statements from your outcome measurement framework
Indicators	Insert indicators developed in Tool
Information Sources	Who can tell you what you need to know? Where can you find the data you need? There are three broad sources: • Project documents • People involved in project activities • People affected by the project
Collection Methods and Frequency	What are the best ways to collect information from these sources? Examples: questionnaires, interviews, focus groups, some of which you may be doing already. When or how often will information be collection?
Who Collects, Sorts, and Compiles	Who is responsible for collecting, sorting, and compiling information for each indicator?
When Analyzed	How ill the information be analyzed? Analysis should take place regularly during the project period to ensure that your activities are yielding the expected outcomes.
Who Analyzes	Who is responsible for: Reviewing the compiles data, deciding what it means, and identifying what decisions and actions should be taken. This is usually most effective when done in a group, either among the project team for short-term outcomes or with the project team and stakeholders to look at progress toward intermediate and long-term outcomes.

Step 2: Thinking through Data Sources

For each of the indicators think about where, or from whom, you will be able to the information your will need. Think though the questions about logistics and sampling before you make a final decision about appropriate sources.

Considerations for Different Data Sources

Data Source	Examples	Logistical Requirements	Data Sampling	Establishing a Baseline
Documents	• Minutes of meetings • Attendance sheets • Telephone call logs, volunteer files • Client records • Newsletters, etc.	• Design records to ensure they capture the data you need • Ensure confidentiality requirements are met	• Need to avoid measurement fatigue • Select most representative in sufficient quantities to get reliable and accurate picture	• Uses the same sampling process used throughout monitoring process • There many not be a baseline for some documents
People Involved at a Short- term Outcome Level	• Activity participants • Staff, advisory committee, or volunteers • Partners and collaborators	• Ensure your data collection method matches your audience, venue, time allotted, and budget.	• Ensure representative sample • Gauge for degree to which diverse groups are included	• Sometimes difficult to collect in trust building processes
People Affected at the Intermediate Outcome Level	• Includes all those involved in the project and some who where not involved but might have been affected such as: friends, family, teachers, policy-makers, etc.	• Challenge to reach people who may have had not direct interaction with the project	• Ensure representative sample • Gauge for degree to which diverse groups are included	• Need to select based on resources available
People Affected at the Long- term Outcome Level	• A community or neighbourhood • An organization • A sector	• This is beyond the scope of an individual project to collect • Usually done through an external evaluation or sector review.		

Step 3: Choosing the Best Methods for the Job

The following table describes some possible characteristics of your information source group and constraints that may exist. Check the characteristics of your group and consider whether or not the constraints described are applicable to your situation. Jot down your own notes on constraints that exist within your project situation.

Characteristics of Source Group	Possible Constraints for Information Gathering
Age Group • 6 –12 years • 13 – 17 years • 18 –15 years • 26 – 65 years • 66+ years	 • Limited writing skills and attention spans • Desire to conform or impress peers • Distrust authority • Limited time • Difficulty hearing, less mobile
Familiarity with English • Fluent • Functional • Basic	 • Very comfortable speaking in front of groups • Limited comfort with writing and speaking in front of group • Requires translation
Ethnocultural Background Difficult to list all variations. Examples include: • Respect for authority • Sense of privacy	 • Uncomfortable being critical • Uncomfortable with open discussion
Gender • Mixed Group	 • Discomfort speaking publicly
Sexual Orientation • Mixed Group	 • Discomfort speaking publicly
Income Level • Mixed Group • Very low income	 • Power imbalances • May be anxious about getting a meal

Choosing the Right Method:

The tool needs to match the type of information needed and the people you are collecting from. Remember that examining outcomes is less about finding out whether people are happy or satisfied and more about finding out what they learned or will apply in their daily lives.

The information gathering methods listed in the following chart can be used with a variety of source groups. It is possible to maximize the advantage and minimize the disadvantage by adapting the method to your particular group.

This is not an exhaustive set of tools, only some possibilities to get you thinking. Feel free to adapt, design, and add your own, if none of these are suitable. Get creative!

Considering your source group, review the possible information gathering methods and their advantages and disadvantages. Check the boxes beside the method that could work for your project

Information Gathering Tools

Possible Tool(s)	Advantages (✔)	Disadvantages (x)
Telephone Survey The project team has a brief number of carefully worded questions that they ask, over the phone, to a randomly selected sample of those the project hoped to influence.	✔ Quick for the survey respondent ✔ Likely to yield reliable data	x Time-consuming for the project team to track down respondents and conduct interviews x Questions need to be carefully crafted to avoid bias. See: http://www2.chass.ncsu.edu/garson/pa765/survey.htm
Personal Interview allows in depth exploration of issues. Offer opportunities for both open and closed questions	✔ Allows individual opinions to be stated	x Takes time x Designing good question is tricky. See: http://www.cc.gatech.edu/classes/cs6751_97_winter/Topics/quest-design/ x Qualitative data is time-consuming to compile for analysis
Guided small group discussion with few questions (so you're collecting the same information from everyone) and a recorder	✔ Everyone can participate ✔ Allows you to check whether messages were heard and understood – clarifies and reinforces the messages for participants ✔ You may have a chance to correct misconceptions once you've heard from everyone, if you plan for that	x Takes time
Informal Conversations Requesting information only from those who come to give feedback, or those who appear less rushed	✔ Informal sampling ✔ You get feedback from people who were motivated to comment	x Your data may be skewed because it doesn't take into account those who didn't feel as strongly one way or another x You need to be sure to ask similar questions of everyone or the data is not comparable x Maybe difficult to record
Close-ended Questionnaire Uses closed, fixed choice questions, where you offer statements, and the respondent indicates how much they agree or disagree with the statement, e.g. I feel welcome when I come to this community facility (Strongly Agree, Agree, Disagree, Strongly Disagree).	✔ Inexpensive to implement ✔ Easier for participants – possible to explain the questions in advance when handing it out ✔ Quick and easy to deal with the data	x Yields only quantitative data x Good questions are tricky. x Need to be very careful that the response categories or scales are clear and understood by your sources
Dot Charts Ask participants to rate various items (perhaps knowledge and skills) by placing dots on a wall chart along a scale from none – lots, or 0 – 5. Do a before and after, and see if the dots moved to assess a change in knowledge or skills.	✔ Quicker than an open-ended questionnaire ✔ Easier for participants – possible to explain the questions in advance when explaining the exercise ✔ Quick and easy to deal with the data	x Yields only quantitative data x Need to be very careful that the choices clear and understood by your sources
Appreciative Discussion Ask participants to tell you what they liked best about what they learned in the session, why that worked so well for them, and how the things that worked well might have been applied to other activities/discussions to improve those.	✔ Brings the creativity and ideas of the group together to focus on improving the session for the next group in a positive way ✔ Allows you to check whether messages were heard and understood – clarifies and reinforces the messages for participants ✔ Quick	x May focus on process, rather than on content – questions need to be carefully crafted

Information Gathering Tools

Possible Tool(s)	Advantages (✔)	Disadvantages (x)
Human Sculpture Ask participants to form small groups and have each small group create a human sculpture that represents a theme they've heard.	✔ Gets them moving ✔ Creative ✔ Can be incorporated into the learning ✔ Uses non-verbal skills	x Takes time x Requires debrief x May only hear about the themes that are easy to illustrate… x Difficult to record the data
Sociogram Ask participants to place themselves on a line according to their experiences or perceptions on a specific subject.	✔ Quick ✔ Gets them moving ✔ Makes a public commitment/declaration ✔ Can be the start of a conversation – so part of the review of a segment of your training	x Difficult to record x Can take time to debrief if the results are unexpected…
Happy/Neutral/Sad Faces Post large happy/neutral/sad faces on the wall, and ask participants to write on sticky notes and post their comments on an aspect of the session, e.g. whether their learning met their expectations, and how or why?	✔ Quick ✔ Anonymous ✔ Gets them moving ✔ Everyone can voice an opinion	x Not likely that everyone will respond x Responses can be ambiguous
Graffiti Wall Post flipchart paper on the wall with a number of felt pens, and request participants' feedback on the session (you may need to ask a project team member to stand close to the wall and invite those leaving the venue to comment on their observations, reactions, ideas, or emotions to the activity.	✔ Quick ✔ Anonymous ✔ Open-ended ✔ Everyone can voice an opinion	x Not likely that everyone will respond x Responses can be ambiguous
Facilitator Survey Most facilitators will be keeping records of some sort about their sessions in any case, but in addition to participant evaluations, or instead of participant evaluations if time runs out, facilitators can respond with their feedback on the session, e.g. level of engagement of participants; types of questions asked; suggestions from participants; number of skills demonstrated in consequent activities, etc.	✔ Quick ✔ Ensures facilitator formally takes the time to reflect on the session and record impressions and lessons learned; ✔ Allows for concrete sharing of ideas and experience among team of facilitators giving similar sessions;	x Subjective x Whenever possible, needs to be correlated with participant data to be reliable.
Skit/Role Play Ask your participants to form small groups and role play some of the ideas that have been discussed	✔ Focuses participants on working together constructively in a fun, active environment ✔ Allows you to observe what participants have learned and yields illustrations of 'real-life' difficulties in applying knowledge ✔ Enriches the learning – participants share their experiences and knowledge ✔ Makes evaluation part of the activity!	x Time consuming x Difficult to record "data" x Difficult to share with funder or other interested bodies

Step 4: Create the Monitoring Plan

Now you are ready to create a customized monitoring plan. Use the worksheet in the section Measuring Outcomes & Social Change (Tool 13) as a guide.

Tool 12

Creating a Monitoring Plan

Short Term Outcomes

INDICATORS

Intermediate Outcomes

INDICATORS

INFORMATION SOURCES	COLLECTION METHODS AND FREQUENCY	PERSONS/GROUP TO DO THE WORK

INFORMATION SOURCES	COLLECTION METHODS AND FREQUENCY	PERSONS/GROUP TO DO THE WORK

Tool 13

Design Information Gathering Instruments

Purpose

To help your group design the right 'instrument' to collect the information needed to measure your project outcomes.

Description

This tool provides examples of information gathering instruments.

When to Use

- At the beginning of any new project, once you have developed a monitoring plan.
- After your group has gone through one round of data gathering and analysis and you want to improve on your information gathering process.

How to Use

In Step 1, identify what questions will need to be answered for each indicator.

In Step 2, with your project team, brainstorm key characteristics of the people you will be collecting from and the considerations for that group identified in Tool X.

In Step 3, apply what you want to collect and the characteristics of the people to be collected from to the development of draft tools.

In Step 4, pretest and revise the tool.

Step 1: Questions to be Answered

Each instrument should provide information that measures change for a number of indicators. With your project team, using the following matrix to identify key questions that need to be answered for each indicator.

What the OMF Reflects	What the OMF Does Not Reflect

Step 2: Characteristics of Group

Discuss with your group the key characteristics of the group you will be collecting information from. List those characteristics in the table below. Identify from Tool 11 possible considerations for that characteristics. Add additional considerations from your own experience.

Characteristics	Considerations
Example: Low literacy levels	Need very plain English
Example: Youth	Need youth friendly language and opportunities to say what they think

Step 3: Drafting the Tools

In the following pages, you will find two examples of a brief questionnaire, one of a longer survey and a focus group format. Use these examples as templates to develop your own, using the information you have identified as needed.

There are also many resources available for drafting appropriate surveys and questionnaires. One good Internet site to check out is: http://www.cc.gatech.edu/classes/cs6751_97_winter/Topics/quest-design/

Step 4: Pre-Test and Revise the Instrument

Here is where you see if the instruments works to get the information you want. Identify 4 – 5 people who have similar characteristics to the people you want to survey. Ask them to try the questionnaire or survey and tell you what they think of it.

Review what their responses to see if the answers are useful. Very often, other people understand a question very differently than what we thought we had asked. Review their answers to see if they understood the question in the same way you intended it. Check to see if the responses are as detailed as you would like.

Ask the individuals who did the pre-test the following questions:

- Did you find the questionnaire easy to read and understand?
- Did the directions give you a clear idea about how to format your response?
- Was the language inclusive and appropriate to your group?
- Did you find anything intrusive?
- Did you feel comfortable answering the questions?

Once you have reviewed the surveys that they completed and the responses to your question, revise the questionnaire or survey in response to their concerns. You are now ready to distribute it to the general population.

Program ______________________________

Support Group Evaluation Form

1. Which face best captures how you feel about this program overall?
   (please mark an 'x' over your choice)

   ☹ 😐 ☺ 😐?

   What do yo like best?

   What do you like least??

2. For each of the following statements please circle the response that best reflects your feeling about that statement.

   - This program has made a difference in my life.

     1. Strongly Agree 2. Disagree 3. Neither Agree or Disagree 4. Agree 5. Agree Strongly

   - I feel welcome when I attend support group meetings.

     1. Strongly Agree 2. Disagree 3. Neither Agree or Disagree 4. Agree 5. Agree Strongly

   - I have learned skills in this program that I use each day.

     1. Strongly Agree 2. Disagree 3. Neither Agree or Disagree 4. Agree 5. Agree Strongly

   - I am a better parent as a result of this program.

1. Strongly Agree 2. Disagree 3. Neither Agree or Disagree 4. Agree 5. Agree Strongly

   - I felt safe when raising my point of view in meetings.

     1. Strongly Agree 2. Disagree 3. Neither Agree or Disagree 4. Agree 5. Agree Strongly

   - I practice better nutrition as a result of this program.

     1. Strongly Agree 2. Disagree 3. Neither Agree or Disagree 4. Agree 5. Agree Strongly

   - I am more aware of community services that can help me as a result of participating in this program.

     1. Strongly Agree 2. Disagree 3. Neither Agree or Disagree 4. Agree 5. Agree Strongly

Program ____________________

Support Group Evaluation Form

3. How relevant was the program to your experience with ______________________________?
   (please mark an 'x' on the line below)

   NOT AT ALL   SOMEWHAT   VERY

   Comments

4. How would you rate the way the program staff (or volunteers) interacted with participants?

   VERY POORLY   VERY WELL

   Comments

5. Describe an experience that you have had since participating in the program that you dealt with differently because of what you learned through this program?

6. How do you think we could improve the program?

Thanks for helping us to assess and improve the program!

Program ________________________

Worksheet Evaluation Form

1. Which face best captures how you feel about this workshop overall?
   (please mark an 'x' over your choice)

   ☹ 😐 ☺ 😐?

2. How relevant was the content of today's workshop to your life?
   (please mark an 'x' on the line below)

   NOT AT ALL SOMEWHAT VERY

   Comments

3. How would you rate the way the material was presented and discussed?

   BAD GOOD

   Comments

4. What has been the greatest benefit for you in this workshop?

5. How can we improve the workshop?

Thanks for helping us to assess and improve the workshop!

Peer Mentorship Participant Survey

Name: ______________________________ Interview Number: __________

Place Interview Occurs: ______________________________

Time Interview Begins: ______________________________ Ends: __________________

Begin with informal conversation… then give the following preamble:

So, as you know, I am interviewing participants to learn more about what programs work best for to help **(fill in your purpose).**

You are a participant in the mentorship program and have told (coordinators name) that you are willing to participate in this survey as part of the evaluation. I'd like to talk to you today to hear about your experiences, opinions, and thoughts about the mentorship program. I know that different **(women/youth/whatever the group is)** will have different experiences and opinions than others so it is important that I talk to a variety of people who see it differently so I can understand the whole picture.

I want to stress that we are not evaluating you in any way, other participants or staff, just the idea behind the program and how it will work in this community. Nor will the community services you use be affected in any way by what you say. What you tell me today will be kept confidential.

So that I capture everything you say, I would like to take notes. Are you OK with this?

It is also important to me that you feel safe answering these questions. If, during this interview, I ask you questions that you cannot or do not want to answer, please feel free to say "no comment" or "I don't know" or to end the interview.

This interview should take approximately 40 minutes. Do you have any questions? Are you ready to proceed?

Peer Mentorship Participant Survey

Interview Guide

Date: ____________________ Time: ____________________ Interview Number: ____________

Interviewer: ______________________________________

1. Let’s start with talking about how the mentorship program works from your experience.

   Probes:
   - How did you first get involved?
   - How long have you attended and how often?
   - What sorts of activities have you been involved with in the mentorship?

2. What was it like to participate in the meetings?

   Probes:
   - How were people included?
   - Can you give me examples of things that worked well in your opinion?
   - Can you give me examples of things didn’t work well in your opinion?

3. I would like to understand more about how this program has affected your day to day life. What did you get out of the mentorship program that you use in your day to day life?.

   Probes:
   - How has your life changed as a result of this participating in this program?
   - What skills did you gain?

Peer Mentorship Participant Survey

Interview Guide

- How about your living arrangements? Have they changed since you began the program? What are your living arrangements now? Is that better or worse than where you lived before?
- What community programs did you find out about through the Mentorship Program that you did not know about before?
- How are the activities you are involved in different from before you participated in the Mentorship program? (How you spend your time?)
- Are there differences in how you interact with people before you participated in the Mentorship program?
- What did you learn about yourself that you did not know before?

4. Tell me about the relationships you formed as part of this program.?

Probes:

- What expectations did you have about relationships with people in the program when you came into it?
- How has your relationship with the other participants worked out for you?
- How has your relationship with the coordinator worked out for you?
- How has your relationship with the coordinator worked out for you?
- How about other (name of the agency) staff?

Peer Mentorship Participant Survey

Interview Guide

5. Do you feel that you have experienced some success in this program? ☐ Yes ☐ No

   Probes:
   - How would you describe this success?
   - If yes, what one thing made the most difference to you?
   - If no, what did not work for you?

6. What do you think are the greatest strengths of the mentorship program?

7. What do you think are the greatest weaknesses of the mentorship program?

8. If you could change one thing about this program, what would it be?

9. We want to learn more about what services should be available to help ***(name the issue)***. When you think back over the time that you were involved ***(name the issue)***, what kinds of services or supports would have a made a difference in helping you to decide to ***(leave the street sooner or go to treatment or get help whichever is appropriate)***?

Peer Mentorship Participant Survey

Interview Guide

Demographic Snapshot

So the last thing I need to do is to ask a few questions about your background so that I can make sure I am talking to a variety of different (women or youth or whatever the group). The information you give us is confidential but please remember that you do not have to answer any question that is uncomfortable to you for any reason.

10. Gender: ☐ M or ☐ F or ☐ T?

11a. How old were you when you first got involved in *(the issue)*? ____________

b. How long were you involved? ____________

12. How long have you lived in *Vancouver* or the *specific community*? In months or years: ____________

13. So now that I have asked you all these questions, would you like to comment at all about the interview process?

14. What could I do differently when I ask *other women or youth or consumers* these questions so that I can do the best I can to make sure they feel safe?

Thank you very much for your time!

Advisory Committee Self-Evaluation/Reflection Process

Objective	Activity	Time & Materials Required
Energizer/ Team Building	Epitaphs - What you would like to be remembered for by the group Helps people begin with what is important to them	Colored paper and pens 30 minutes
Describe Original Principles/ Original Plan	Select a group historian/ elder - have them present the history Group reflection - "I had a dream…" Helps people reflect back on what their original hope for the group was when they started this process	Colored paper and pens 30 minutes
Review our Structure and Construct Our History	Put a timeline up on paper on the wall and ask facilitate a discussion about what you did when. Helps recollect what your have done so far	30 minutes
Assess What We Have Done	Post- it notes for strengths and weaknesses of activities to date – work in teams of two Helps critically analyze what we have done	Post- it notes Over a break
Review Strengths and Weakness	Facilitator Collation and Presentation Discussion of what contributed and detracted from each activity	20 minutes
Brainstorm Actions by Category: Membership, Steering Committee, Working Groups, community events	Brainstorming for the future by just writing down the ideas without discussion	Flip chart 1 hr
Set priorities	Dotmocracy to set highest priorities. This involves giving participants 3 – 5 colored circles and having them place the circles on the actions that they think are the highest priorities	Colored sticky circles 20 minutes
Prepare Draft Evaluation and Plan	The facilitator types up the results of the day and sends it out to participants between meetings	Between meetings E- mail access so participants get the results between meetings
Identify specific actions, timelines and roles	At the next meeting review your priorities and make specific plan assigning responsibility to members.	Flip chart 1 hour