

University of Calgary Program Evaluation Toolkit

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Foundations of Evaluation

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	Section Title and Link	Description of Section
1.	Introduction	A brief overview of this section.
2.	Why Should You Evaluate?	One of the most often asked questions is “why evaluate?” Here are some good reasons to evaluate programs and what evaluation can do for you.
3.	What is Evaluation?	You know why to evaluate, but what is evaluation, exactly? In this section we will offer a brief synopsis of the different kinds of evaluation you can use.
4.	When Can You Evaluate?	This section covers evaluating at different stages of the program’s cycle (i.e. before, during, and after a program).
5.	Benefits and Considerations of Evaluation	How does this apply to evaluation for you and your program?
6.	Summary	A quick summary of this document.
7.	Definitions	Definitions of common terms used in this section.

General Resources:

Title	Description	Format
Evaluation: What Is It and Why Do It? [1]	This website discusses the why and what of evaluation	Guide
The Power of Early Evaluation [2]	This PDF discusses why you should consider evaluation and why you should evaluate early on.	Guide

1. Introduction

In this section, we will explore some of the fundamentals of evaluation and why it is important. Reading through this section and completing accompanying activities will help you feel more prepared to create and implement an evaluation plan in Step 1. Just a reminder that the toolkit is applicable to all program evaluation, but some of the tools and resources relate to mental health, since it supports the implementation of the Campus Mental Health Strategy.

2. Why Should You Evaluate?

Evaluation is a vital component of program planning and development because it helps to understand programs, their impact, and how to improve them. There are several reasons evaluation is such an important part of program planning and implementation, including:

- Helping to secure funding and grants
- Validating that your program is meeting its stated objectives and is making a difference
- Building confidence in the program and in the work you are doing

- Helping to further understand and improve the program
- Using learnings from the program elsewhere
- Helping to monitor ethical due diligence, if applicable

For Funding and Recognition

Some of the most compelling reasons for program managers to evaluate include helping prove the program's worth to management and/or for funding applications [3]. Results and data from evaluation can provide compelling evidence for grant providers and administrators on the efficacy and impact of a program. A detailed evaluation plan can also act as an indicator that program managers are willing to be accountable to their program's objectives and goals [4].

To Understand and Improve Your Program

Evaluation helps program managers and other stakeholders (such as volunteers, target groups, participants, leaders, etc.) to better understand and improve their program. Measuring the successes and identifying areas of improvement of programs let people discuss questions such as "How did this work or not work, and why? How can we use this information to improve our program?" Asking these reflective questions through evaluative measures (such as surveys, interviews, and focus groups, and even informal conversations) provides program managers with the data and tools to have informed conversations with answers to such questions and to strategically plan future program cycles based on this information [4].

To Help Other Programs

In addition to providing value for program managers, evaluation can also add to more general knowledge bases [4]. Results of evaluations on programs can be used to inform new programs or external programs and policies, either from a research perspective or from more informal best practices [4]. Think of a time, for example, when you asked a colleague or co-worker experienced with a similar program for advice on implementing your own program. This would be an example of applying best practices. Using and adding to existing knowledge bases can be helpful not only for your own purposes, but can also help your colleagues and institution create effective programs.

To Monitor Ethics

Finally, for programs that are providing a guarantee of improvement in some area, such as mental or physical health, it may be ethically necessary to provide some form of evaluation to assess the outcomes of the program for individuals and to improve the program overall [4]. This will be explored further in the ethics section in [Step 1B](#).

In summary, the motivations for evaluating programs may vary from stakeholder to stakeholder, as well as the preferred methods for evaluation and data collected [4]. Certain stakeholders and groups may find certain kinds of evidence or evaluation data more applicable in different circumstances [4]; it is therefore important to consider the reasons why you are evaluating and select the methods of evaluation that will best support this, all of which we will review later.

Other Ideas

Evaluating your program can show you that you have done a good job and help build your (and/or your team's) confidence in the work that you are doing. In this way, it can be a very personally rewarding experience to evaluate. By proving that you have achieved the objectives you set for your program, you can demonstrate to yourself (and any other interested parties such as management or your team members) that your program, and all your hard work, has value. This is inherently a confidence-building project!

3. What is Evaluation?

Evaluation is the assessment of the need for a program, the process of implementing the program, the impacts of a program, and the achievement of the program's objectives. It is best to identify indicators of program success as well as program goals at the planning stage, prior to the beginning of evaluation [4] (see Step 1A). Evaluation may include multiple methods of data collection, such as surveys, interviews, focus groups, observation, and more informal methods. What they all have in common is that the results of this data collection go towards more fully understanding the need for a program, whether the program objectives have been reached, and what that process looked like.

Oftentimes, program managers will only consider evaluation to be something done before and/or after a program. However, evaluation can occur through multiple stages and take multiple forms. Each of these types of evaluation has its benefits and uses, and the best evaluation plans use a mix.

Types of Evaluation

We will show you how to evaluate and build an evaluation plan in Step 1. In the meantime, here is some information for you to consider. There are two main types of evaluation: **outcome evaluation** and **process evaluation**. Program managers are typically most familiar with outcome evaluation; however, both are important to ensuring a well-rounded understanding of a program.

Outcome evaluation is focused on documenting the changes and impacts that occurred because of a program [4]. The focus is on whether the overall objectives of a project were met and the impact that the program had on its participants [5]. Outcome evaluation helps to answer the question "did my program achieve its objectives?" It may assess variables such as changes in attitudes, impacts on program participants or targeted groups, and the like.

Process evaluation focuses on the processes that went into the creation and implementation of the program and on how the program proceeded [6]. Have you ever been part of managing a program that seemed to do wonders for its participants and was a breeze to implement? This is the work of process evaluation: aiding at looking into the day in, day out operations of the program to ensure that *how* the program is done meets stakeholders' needs. Example questions include: Are funds being allocated appropriately? Are staff and participants satisfied with the running of the program? Is the program offered in the way it was intended?

4. When Can You Evaluate?

Before a Program Begins

Before starting your program, it can be helpful to first get feedback from program stakeholders, including staff, volunteers, funders, and the group your program will serve (participants) [6]. Program evaluation that occurs before the start of a program helps answer the questions “is this program needed, is this program practical, and is it addressing our participants’ needs?” [6].

Some useful evaluation questions to ask yourself before a program begins can include:

- What is the purpose of this program? What are its objectives? What is the theory or logic behind our expectations that the program will meet its objectives?
- Is this program something that our target group or demographic needs? How do we know?
- Who are our main stakeholders? What do our stakeholders (faculty and staff members, volunteers, funders, participants, etc.) think of the plan for our program? For our evaluation?
- Is there any feedback or data from previous programs or program cycles we can use? Is there research literature or statistics we can use in program planning?

While a Program is Running

Evaluation can also occur during the implementation phase of a program. This is called process evaluation. Process evaluation focuses on the process of running or implementing the program itself and the process through which a program achieves its objectives. Ideally, planning for this happens prior to starting the program itself. This can include focusing on data such as communication methods, program promotion, volunteer recruitment and experiences, activities, delivery methods, training and onboarding for staff and volunteers, resources available during the program, participation from the target audience, division of responsibilities, staff changes, and so on [7]. This is vital as it allows stakeholders to understand how objectives were achieved as well as the barriers and challenges to try and avoid or solve in future program cycles [4]. Evaluating your program in its early stages and during implementation can be helpful for several reasons:

- It can allow you to adjust your program as needed based on early feedback from participants and managers;
- It can provide you with preliminary data for grants or presentations; and
- It can help give you more ideas on what and how to evaluate after your program is complete [8].

Some useful evaluation questions to ask yourself during a program can include:

- Is the program being implemented according to schedule? Why or why not?
- Are things going as expected? Why or why not?
- What feedback do program managers, volunteers, staff members, and participants have about the program at this point?
- What is going well? What is not going well?

- Are resources being used according to schedule? Does it look like we will have any leftovers or are we using more than expected?
- What are my reflections on how the program is going so far?

After a Program Finishes

After a program ends, program managers can conduct an outcome evaluation to assess how well the objectives were met. Evaluation that is completed at the end of a program can incorporate the results from all evaluations done over the course of the program cycle, including evaluation done before the program began, done during the program, and done afterwards. Looking at all these evaluations at the same time helps paint a clear picture of the program, as if from a bird's eye view. This combination of evaluations from different periods of the program cycle can allow program manager to get a well-rounded understanding of their program and of how it served its participants and achieved its objectives.

Some useful evaluation questions to ask yourself at the end of a program can include:

- Did the program meet its objectives? Why or why not?
- What impact(s) did this program have on participants? Were these impacts what we had anticipated?
- What did participants or the target group feel the impact of the program to be? What about volunteers, staff members, and program managers?
- Were the needs of participants met by this program?
- How did we do in terms of budgeting for resources (financial, staff, etc.)?

5. Benefits and Considerations of Evaluation

Evaluation can be an extremely beneficial and worthwhile part of program planning to undertake and invest resources in. However, it is often missed because of a lack of resources, knowledge of how to start and do it, and the perception that it takes a lot of time.

Some program managers fear that by evaluating, unsatisfactory results will emerge, which could have potential negative impacts on the program or on program stakeholders. So, a perception may exist that it is better to have no data on a program than it is to have negative data [4]. However, it is important to note that the benefits of program evaluation almost always outweigh any real or perceived risks.

Sometimes program managers worry about ethics, but one does not always have to go through the process of gaining ethics approval if you are not planning to disclose data or results of analyses. A great deal of data is collected for quality assurance purposes only, and this type of evaluation is not published or shared widely. Instead, it is used solely for internal program planning and strategizing. So if you're not going to use findings beyond the improvement of your program you generally don't need to worry about applying for ethics approval (for more information on ethics review and to find out if it's required for your program, see [Step 1B](#)).

Engaging in process evaluation can also act as a helpful moderating factor for any feared negative impacts of evaluation, as the results of process evaluation will elaborate on external factors impacting a program, and will also reveal important information on how to improve a program in future cycles [4].

Lack of time is also considered a deterrent to doing evaluation. However, a little bit of work in learning how to evaluate goes a long way and is a transferable skill for numerous jobs. Once the basics are established, evaluation becomes second nature and does not take much time! They say time is money, and since it takes less and less time to implement once you know how to do it, it will begin to pay dividends.

To put this all together, while evaluation may seem daunting, program managers, stakeholders, participants, and the program itself almost inevitably benefit from its use!

6. Summary

In this section, we covered the basics of evaluation. We hope you now have a better sense of what evaluation is and why it is recommended for use. We also hope we got you thinking a little bit about what evaluation can do for your program. Perhaps you even began to consider what kinds of evaluations may be of a good fit for you and your team. In the next section, we'll delve a little deeper into this process. For now, here is a summary of what we've covered:

- Evaluation can aid with funding and grant applications, understanding or improving programs, contributing to a practice knowledge base, and being ethically diligent.
- Evaluation is a systematic way of assessing the impacts of a program, the process of implementing it, and achievement of its objectives.
- There are two main types of evaluation:
 - Outcome evaluation: Looking at the impact that occurs because of the program.
 - Process evaluation: Looking at how the program is being implemented.
- Evaluations can be carried out before, during, or after a program.
- Despite many assumptions about evaluation, it is almost always better to evaluate than not to evaluate!

7. Definitions

Evaluation: Evaluation is the assessment of the need for a program, the process of implementing the program, the impacts of a program, and the achievement of the program's outcomes.

Outcome evaluation: documenting the changes and impacts that occurred because of a program [4].

Process evaluation: assessing the processes that went into the creation and implementation of the program and on how the program proceeded [6].

Program manager: the individual or group of people who are primarily responsible for planning, implementing, and evaluating the program.

Stakeholder: anyone and everyone who is impacted by, has a say in the running of, or has some investment in the program's implementation (i.e., participants, program managers, funders, staff, etc.).

References

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- [9] My-Peer Toolkit, "Evaluation: Monitoring and Evaluation," Western Australian Centre for Health Promotion Research, 2010. [Online]. Available: <http://mypeer.org.au/monitoring-evaluation/>. [Accessed 25 August 2017].

Step 1A: Program Planning

Table of Contents

	Section Title and Link	Description of Section
1.	Introduction	A quick overview of the content in Step 1A.
2.	Assessing Resources and Capacity	This section discusses things to consider before starting evaluations, including who should evaluate, how much capacity you have, and how many resources you are able to take advantage of.
3.	Creating a Program Plan with Logic Models	Logic models are a simple but useful tool to better understand your program and to plan for success.
4.	Creating an Evaluation Plan	This section discusses how to create a comprehensive plan of how you will evaluate your program.
5.	Creating an Evaluation Timeline	Without a timeline, how will you know when to do what? Here we help you prepare a document to make sure you are on track.
6.	Writing an Evaluation Plan	This section talks about how to write up all the information you learned in this section into a document you can share with others.
7.	Definitions	Some commonly used words in this section and their definitions.

General Resources:

Title	Description	Format
Workbook 1: Planning Evaluations [1]	This workbook provides an extensive overview of the processes and steps involved in planning an evaluation	Guide
Better Evaluation Rainbow Framework [2]	This guide provides an overview of the evaluation planning process and the different stages and tasks involved in evaluation	Guide

1. Introduction

In Step 1A, we will explore you and your team’s capacity for evaluation. We will examine the process of creating an evaluation plan, an important part of which is understanding your program goals by using a simple tool called a logic model. We will discuss the selection of evaluation methods (which will be covered in more detail in subsequent Steps). Finally, we will talk about creating an evaluation timeline as a way of keeping track of all this work. In the next section, we touch in more detail on creating your evaluation method.

2. Assessing Resources and Capacity

Before getting started on preparing and planning your evaluation, it is important to reflect on how you will be completing your evaluation plan, your current capacity and resources, and who will be responsible for evaluation going forward. Consider the following questions before getting started on your program evaluation plan [3]:

- Who will be responsible for creating an evaluation plan?
- Who will be responsible for completing the actual evaluations?
- Who will be responsible for completing analyses and reports or giving presentations on results?
- How much time can be allocated for staff to complete their evaluation responsibilities and tasks?
- Do staff members have adequate experience or expertise in evaluation to carry out their evaluation tasks and responsibilities? Do they need additional training or resources?
- What resources are we able to dedicate towards evaluation?

It is important to assess your capacity and the capacity of your team to take on evaluation-related tasks. Also consider if additional resources such as training, external evaluators, or additional funds are required. Taking inventory of your capacity prior to creating an evaluation is an excellent idea, as it allows you to take these considerations into account.

Resources:

Title	Description	Format
Assessing Your Readiness for Evaluation [4]	This is a great tool to determine beliefs and attitudes you or your team members hold towards evaluation. It may help you consider any negative beliefs you have towards evaluation and refute any that are unfounded.	Worksheet
Assessing Your Evaluation Capacity [5]	This checklist may help you identify existing resources and capacity for evaluation and will help you identify any gaps you will need to address.	Checklist
Workbook 1: Planning Evaluations [1] Pages 12-13	This workbook section provides an overview of assessing your team’s readiness to evaluate and resources.	Guide

Before You Get Started [3]	This website discusses which types of resources you will need to perform an evaluation and things to think about before you start.	Guide
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3. Creating a Program Plan with Logic Models

Logic models are a program development tool that can help you better understand your program. Logic models are diagrams that visually represent the vision and inner workings of a program, the components that go into creating it, and the things that ideally should result from it [6]. Logic models help document and simplify the wealth of information that goes into the implementation of a program and aid stakeholders in ongoing monitoring and evaluation [7].

Prior to creating a logic model, however, it is good practice to explore broader questions relating to your program. These can be found in Table 1.

Table 1
Program Visions, Goals, and Objectives

Type	Description	Example
Vision	<ul style="list-style-type: none"> Represents how “things would look if the issue important to you were completely, perfectly addressed” [8] Should resonate with stakeholders and participants, represent stakeholders’ and participants’ views, motivate and energize those involved, and be simple to convey [8] 	<ul style="list-style-type: none"> “Caring communities Healthy children Safe streets, safe neighbourhoods Every house a home Education for all Peace on earth” [8]
Goal	<ul style="list-style-type: none"> Stemming from the vision, these are broad, aspirational indicators of the program’s general direction [9] Aid in focusing the program Program can have goals that can never be reached 	<ul style="list-style-type: none"> “Build positive mental health and resiliency at the University of Calgary” “To help students, faculty and staff increase resiliency and capacity to flourish in their daily life.” “To create an inclusive campus with a focus on a caring and supportive environment.” “To increase awareness of mental health programs and services offered on campus and in the community.” “To increase collaboration across campus partners on the topic of promoting positive mental health.”
Objective	<ul style="list-style-type: none"> Stemming from goals, these statements denote the results you wish to accomplish and how you will accomplish them [9] There may be more than one objective to a program goal SMART objective format often used [9]: <ul style="list-style-type: none"> Specific Measurable Achievable Relevant 	<ul style="list-style-type: none"> “By (month/year), increase the percentage from (X%) to (Y%) of providers in County Z that fully adhere to the CDC-STD treatment guidelines for appropriate treatment of gonorrhea” [9]. “By year two of the project, LEA staff will have trained 75% of health education teachers in the

- Time-bound

school district on the selected scientifically based health education curriculum” [10].

Once you and your team had an opportunity to explore your program’s vision(s), goal(s), and objective(s), you can begin on the logic model. The core components of a basic logic model are: Resources (Inputs), Activities, Outputs, and Outcomes. Table 2 provides an example of a logic model [7].

Table 2
Sample Logic Model Template

Resources (Inputs)	Activities	Outputs	Outcomes
To achieve our activities, we require:	To achieve our objectives, we need to implement the following activities:	We can gauge our activities by counting or recording these events or products:	We anticipate our program’s activities will result in the following:
<ul style="list-style-type: none"> • Money • People (staff / volunteers) • Equipment • Technology • Facilities • Knowledge • Participants/ Clients/ Patients 	<ul style="list-style-type: none"> • Recruit • Deliver services • Train (volunteers, staff, etc.) • Provide service (therapy/ counselling, etc.) • Evaluate the program • Develop and implement workshops/ services/ etc. 	<ul style="list-style-type: none"> • Number of attendees • Program attrition rate • Number of sessions/ workshops/ etc. • Duration and frequency of attendance, sessions/ workshops, etc. • Number of pamphlets handed out • Participant feedback • Participant satisfaction 	<ul style="list-style-type: none"> • Improvements in target group’s experience(s) in X area (mental health, loneliness, time-management, etc.) • Tied back to the program objectives: what will happen because of implementing the program? • Short-, medium-, and long-term changes.

Outcomes relate to short-, medium-, and long-term changes. Short-term outcomes pertain to “change[s] in awareness, knowledge, skills or access of a target population” [11]. Medium-term outcomes are typically behavioural changes that are materialized once at least one short-term outcome is accomplished. This can be at the “individual, group, organizational or community level” [11]. Lastly, Long-term outcomes occur when at least one medium-term outcome has been accomplished; these “include more of a social impact” [11]. Examples of each are below:
Short-Term Outcome: increase in “knowledge of healthy choices” [12].

Medium-Term Outcome: increase in “adoption of healthy food practices” [12].

Long-Term Outcome: increase “food security” [12].

Working on a logic model as a team, or getting feedback on it from multiple stakeholders, ensures that no components of a program are missed. It is also a helpful opportunity to have a group conversation on a program and to clarify any points of confusion or misconceptions [13].

For more information on logic models and how to create them, check out the great resources below.

Resources:

Title	Description	Format
The 2010 User-Friendly Handbook for Project Evaluation [14]	Chapter 3 contains some fantastic information on how to create logic models.	Guide
Introducing Program Teams to Logic Models [15]	This is a journal article that discusses logic models in-depth.	Guide
Program Development and Evaluation: Logic Models [16]	This website contains lots of information about logic models and includes templates, examples, and online courses.	Guide Template Examples Presentation
Developing a Logic Model or Theory of Change [13]	This website contains a very accessible guide to logic models and includes great examples and resources.	Guide Examples Templates
Clarify Program Logic [6]	This website contains a simple guide to logic models and includes great examples and resources.	Guide Examples Templates
Fillable Logic Model Template from YouthRex [17]	This is a fillable PDF template of a logic model, including a definitions page.	Template
Checklist: Critical Elements in a High-Quality Logic Model [18]	This link will download a word document checklist for high-quality logic models.	Checklist
Differentiating Outputs from Outcomes [19]	This link will download a word document that explains the difference between outputs and outcomes	Guide

4. Creating an Evaluation Plan

When preparing for evaluation, it is important to begin with a strategic and reflective stance on your program. Often, evaluation is included as an afterthought in the program development or planning process. While evaluations can certainly be built upon and developed over the course

of the program, planning for evaluation early on can help program coordinators and stakeholders to reflect on certain issues *prior* to beginning their evaluations, such as [20]:

- Who is the evaluation for?
- What do we need to find out from the evaluation?
- When will the findings be needed?
- Where will the findings be needed?
- Where should we gather information?
- How will the results be used?

Evaluation Plans are individualized guides on how evaluation will be conducted for a program throughout its implementation [21]. It acts as a roadmap on how you will conduct evaluation for your program and provides the steps needed to take for you to complete these evaluations [22].

Creating an evaluation plan has several main steps:

- Clarifying your program objectives and goals,
- Developing evaluation questions and methods,
- Creating a timeline for evaluation activities [13], and
- Bringing these together in a written evaluation plan document [22].

Throughout this process, it is important to bring in the perspectives and feedback of multiple program stakeholders, such as program participants, volunteers, staff and faculty, management, community members, and other groups [22]. This ensures that your evaluation plan considers all factors that may impact during and after the program, and ensures buy-in from multiple groups [22].

See the resources below for some excellent information on building a comprehensive evaluation plan.

Resources:

Title	Description	Format
Developing an Evaluation Plan [23]	This guide includes information on how to construct an evaluation plan, along with useful tools, resources, and examples.	Guide
Developing an Effective Evaluation Plan [24]	This guide from the CDC is an in-depth guide to all facets of evaluation planning (and also includes a discussion on program planning and logic models).	Guide

Workbook 1: Planning Evaluations [1]	This workbook provides an extensive overview of the processes and steps involved in planning an evaluation.	Guide
Worksheet 4: Evaluation Planning [25]	This is a good evaluation planning worksheet.	Worksheet
Example Evaluation Planning Worksheet [26]	This is a filled example of the planning worksheet above.	Example
Identifying Stakeholders and Their Roles Worksheet [27]	This is a worksheet to help you identify important stakeholders.	Worksheet

5. Creating an Evaluation Timeline

Evaluation timelines provide an overview of what components of your evaluation will be done when. They include information on who will be responsible for each component of the evaluation, including creating evaluations (surveys, interview questions, etc.), who will administer evaluations (send out surveys, facilitate focus groups, etc.), who will collect and analyze data, who will write reports and give presentations, and so on. It should also include information on what resources will be necessary to complete each component of the program evaluation, including staff time and resources, training and expertise, and physical or financial resources, and so on. When complete, it should give a broad overview of when evaluations will be completed, and the amount of time and resources that will need to be budgeted to prepare for them.

When creating your evaluation timeline, consider the following questions:

- When do I want to start creating my evaluation plan?
- When do I want to have my evaluation plan completed?
- When do I plan on consulting about my evaluation plan with colleagues, mentors, or experts?
- By what time do the various components of my evaluations (e.g. surveys, questions) need to be printed, collected, created, and the like?
- How far in advance do I wish to contact participants or remind them about workshops, interviews, or focus groups?
- When will I begin collecting data?
- When will I start analyzing the data?
- By what time do I want to have any final reports or presentations of my findings written?
- Who will be responsible for each aspect of the evaluation?
- What resources will I need for each aspect of the evaluation?

Creating evaluations, just like programs, is an iterative process. As you move along your evaluation journey, you may learn new things that influence your timelines, and that is alright. Just keep consistent in terms of your methodology and keep others informed about changes that you are making. It may help to have a written document with your evaluation timeline that you can consult from time to time to check on your progress, and make changes to as needed. Looking back over the changes you have made after a program cycle may even help you reflect on the lessons you have learned about program evaluation and development.

Resources:

Title	Description	Format
Sample Evaluation Timeline [28]	An example of an evaluation timeline	Example
Project Evaluation Tasks [29]	An example of an evaluation timeline and the stages of an evaluation timeline.	Example
Establishing Timelines and Responsibilities [30]	This document provides an overview of creating a long-term program evaluation timeline over the course of several program cycles.	Guide

6. Writing an Evaluation Plan

Please find a [blank Evaluation Plan Template here](#). Evaluation plans will reflect the scope and needs of the program and the stakeholders they are being created for. These internal documents can be shared with your team or leader. Components that should be included in all evaluation plans can be found below [24]:

- **Title page:** a title page including the name of the program, year, and the individual who wrote the document
- **Program description:** an overview of the program, including information on the program goals, objectives, etc. Program logic models are often included in this section.
- **Evaluation focus:** this describes the main priorities of the evaluation, how the evaluation will be used, and so on. This allows the evaluation team to understand the main priorities for evaluation in case of time or resource constrictions during the project.
- **Methods:** this describes what methods will be utilized for the evaluation (survey, interviews, focus groups, etc.), and how data will be collected.
- **Evaluation timeline:** this includes information on when evaluations will take place, which methods, etc.

- **Analysis and interpretation plan:** information on how the data will be analysed and interpreted.
- **Use, dissemination, and sharing plan:** information on how the information will be utilized, and whom it will be shared with.

Resources:

Title	Description	Format
Developing an Effective Evaluation Plan: Setting the Course for Effective Program Evaluation [24]	This guide includes information on creating an effective evaluation plan and evaluation plan.	Guide
Example Evaluation Planning Worksheet [26]	This sample evaluation plan showcases a more informal evaluation plan style.	Example
Evaluation Plan Template [25]	This template allows you to fill in an informal evaluation plan.	Template

7. Definitions

Evaluation Plan: an evaluation plan is a document which contains the steps, method, and timeline of your evaluation.

Logic Model: a program evaluation tool to visually organize your program’s inputs, activities, outputs, and outcomes. It also helps detail your program in terms of its vision, objectives, and context.

Resources/Input: what is required in order to run your program.

Activities: what needs to be done to run your program.

Outputs: countable things that indicate that your program is running.

Outcomes: what you hope to achieve in your program, short- and long-term.

Vision: statement indicating what the world would look like if your program completely addressed the main issue.

Goal: broad aspirational indicators that indicate the program’s general direction.

Objectives: SMART statements that indicate that progress is being made towards the program goal(s).

SMART goals: goals or objectives that are specific, measureable, attainable, realistic, and time-bound. This format for goal setting is commonly used at the University of Calgary and other higher education institutions. [31]

Context/ Conditions: the conditions in which your program is operating, including any barriers to achieving your program goals or objectives.

Evaluation Method: tools that you select to answer your program evaluation questions.

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Step 1B: Evaluation Planning

Table of Contents

	Section Title and Link	Description of Section
1.	Introduction	An overview of this step.
2.	Ethics at the University of Calgary	Does your evaluation count as quality assurance, or research? If it is considered to be research, you will need to apply for ethics approval. Visit this link to learn more.
3.	Choosing Between Evaluation Methods	Should you do a survey, or conduct interviews? Click this link to learn more about the benefits and drawbacks of each evaluation method.
4.	Evaluation Using Surveys	Click this link to see all considerations for evaluating your program with surveys.
5.	Evaluation Using Interviews or Focus Groups	Click this link to see all considerations for evaluating your program with interviews or focus groups.

General Resources:

Title	Description	Format
Choosing Data-Gathering Methods for Your Project [1]	This PDF is a very comprehensive guideline for surveys, interviews, and focus groups. It contains advantages and disadvantages of each method, steps for developing each evaluation method, and useful tips.	Guide

1. Introduction

In this step, we will cover the question of Ethics and provide a description of various evaluation methods. This information will help you and your team populate your evaluation plan to begin to take concrete steps on your evaluation journey.

2. Ethics at the University of Calgary

Ethics for Program Evaluation: The Ethics Process at the University of Calgary

What is “Ethics”?

All research conducted with humans is required to undergo a review to ensure it adheres to a set of ethical standards that were developed to protect participants and minimize any risk. In Canada, ethical

standards for research are described in the [Tri-Council Policy Statement: Ethical Conduct for Research Involving Humans \(TCPS\)](#). This is a policy created by the federal government that provides comprehensive guidelines on ethics in research.

There are two research boards at the University of Calgary that review applications for ethics approval: the [CHREB](#) and the [CFREB](#). These research boards use the TCPS as a guide to determine whether a project will require an ethics application. The CHREB reviews applications from the faculties of Kinesiology, Medicine, and Nursing, while the CFREB covers research submitted from all other faculties. In addition, the CHREB reviews any research involving the collection of health information. Most program evaluations relating to the Campus Mental Health Strategy would be reviewed by the CFREB.

Who needs to apply for an ethics review?

The TCPS defines research as “[a]n undertaking intended to extend knowledge through a disciplined inquiry and/or systematic investigation. The term “disciplined inquiry” refers to an inquiry that is conducted with the expectation that the method, results, and conclusions will be able to withstand the scrutiny of the relevant research community” [2]. If your evaluation involves interaction with people and meets the definition of research as defined by the TCPS above, it will likely require an ethics review. Determining whether ethics review is required can sometimes be unclear. It is best to contact the research ethics office directly for any questions on the need to apply (see contact information on the final page of this document).

Resources:

The [CHREB](#) website has a helpful FAQ section at the bottom of the page which includes a section on when an ethics review is required.

Who doesn't need to apply for an ethics review?

The following are two evaluation-relevant examples of activities that are exempt from ethics review. **For a full discussion of additional situations and examples that are exempt from ethics review, see [this exemption document](#) from the CFREB.**

1. If the individuals are merely facilitating access to information and are not themselves the focus of the research, they do not require CFREB review. For example, the TCPS states: *“one may collect information from authorized personnel to release information or data in the ordinary course of their employment about organizations, policies, procedures, professional practices, or statistical reports. Such individuals are not considered participants for the purposes of this Policy. This is distinct from situations where individuals are considered participants because they are themselves the focus of the research. For example, individuals who are asked for their personal opinions about organizations, or who are observed in their work setting for the purposes of research, are considered participants.”* For further information and examples, see [TCPS Article 2.1](#)
2. Quality assurance and quality improvement studies, program evaluation activities, and performance reviews, or testing within normal educational requirements when used exclusively for assessment, management, or improvement purposes, do not constitute research for the purposes of the TCPS and therefore do not require CFREB review. For more information, see

[TCPS Article 2.5](#). However, the distinction between research and quality assurance can be unclear and difficult to determine. Please see the next section for information on how to distinguish between research and QA.

The information above has been taken from [this exemption document](#) released by the CFREB. Please consult this document for more information.

How do I know if my program evaluation will count as Quality Assurance and not Research?

“The distinction between research and quality assurance activities is not always clear. The intent to present or publish the findings are not factors that determine whether the activity is research requiring ethics review. The primary intent and purpose of the activity is the key consideration: is the intent and purpose to produce findings that can be used to improve practice or service delivery within an organization, classroom, or training program? For example, are you evaluating the success of a training program and using the findings to improve future program delivery? Would the project be carried out even if the results might not be applicable anywhere else? Who is the primary audience for the results – individuals within your organization or the scholarly community? Is the publication of the findings in the scholarly literature a primary goal? The CFREB pays special attention to these questions when deciding whether an exemption applies to your situation. If data are collected for the purposes of quality improvement studies or program evaluation activities, and later proposed for research purposes, it would be considered secondary use of information not originally intended for research, and at that time may require CFREB review to be compliant with the TCPS. Be sure to check with the CFREB in these situations” [3].

Resources:

[This flowchart](#) may be helpful in determining whether or not your program evaluation counts as research.

[This comparison table](#) shows the difference between Quality Assurance and Research in several different domains.

How do I apply for an ethics review?

All applications must be prepared online using the [IRISS](#) system. You will need to register for access to IRISS: reference the user guide [here](#), and check the FAQ [here](#). Questions related to registering for IRISS can be directed to iriss.registration@ucalgary.ca.

Currently, all UCalgary students involved in human participant research are required to complete the [Course on Research Ethics \(CORE\) Tutorial](#) and to upload their certificate to their [Researcher Profile](#). See [this page](#) for more information about the CORE tutorial.

Once you are registered and have full access to IRISS, you can begin the application. [This](#) is a guide for how to start a new application for an ethics approval.

Resources:

Reference the CFREB website for resources, including the [Common Issues and How to Avoid Them](#) document, as well as the CFREB Consent Template (listed under “CFREB Forms & Templates”).

Who can I contact for help?

If you have questions about anything to do with research ethics, contact the CFREB or CHREB as appropriate:

<p>CFREB</p> <p>Email: cfreb@ucalgary.ca</p> <p>Phone: 403-220-6289/220-4283</p> <p>Website</p>	<p>CHREB</p> <p>Email: chreb@ucalgary.ca</p> <p>Phone: 403-220-7990</p> <p>Website</p>
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If you have questions about the IRISS system, contact the IRISS Help Desk:

<p>IRISS Help Desk</p> <p>Email: iriss.support@ucalgary.ca</p> <p>Phone: 403-210-7900</p> <p>Walk in support: MLT 107, M-F 8:30-4:30</p> <p>Website</p>

If you have questions about the CORE tutorial, contact REB Training Support:

<p>REB Training Support</p> <p>Email: REB.training@ucalgary.ca</p> <p>Phone: 403-220-2297</p> <p>Website</p>

Note: The information compiled here is not guaranteed to be up-to-date, and should be used as a starting point for your research into ethics. It is always preferable to ensure you have the most up-to-date information on ethical requirements by visiting the University of Calgary’s Ethics & Compliance site [here](#), and [contacting the ethics office, as needed](#). **The CFREB or the CHREB should always be contacted with any questions or concerns, or if you are unsure whether your program evaluation requires ethics approval.**

3. Choosing Between Evaluation Methods

Choosing an evaluation method can often seem to be an overwhelming task; however, with a bit of reflection and discussion with key stakeholders, finding the right method for you can be relatively simple. There are several ways to collect data, including:

- [Surveys and Questionnaires](#)
- [Focus groups](#)
- [Interviews](#)

Other types of data collection methods exist as well: case studies, observation, expert or peer review, diaries or journals, document analyses, and the like [4]. For more information on how to choose between these methods, see the following excellent resources.

Resources:

Title	Description	Format
Choosing Data-Gathering Methods for Your Project [1]	This PDF is a very comprehensive guideline of different evaluation methods.	Guide
Advantages and Challenges of Data Collection Methods [5]	The following is a very handy chart showing advantages and disadvantages of each type of collection method.	Chart
Tools used at UCalgary and beyond	See the following excel sheet for a directory on commonly used tools at the University of Calgary, and other tools that we have found that may be applicable. This may help you decide which evaluation method is best suited to your program.	List of Tools
Focus Group, Interview, or Survey? Which is right for your co-curricular program? [6]	This presentation provides a quick guide to selecting your methods and choosing which method (surveys, focus groups or interviews) is right for your team.	Presentation
Planning Evaluations [7]	Starting on page 35, this PDF contains some good information on the different types of measures.	Guide
User-Friendly Handbook for Project Evaluation [8]	Starting on page 58, this PDF discusses the pros and cons of many different types of evaluation methods.	Guide

4. Evaluation Using Surveys

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	Section Title and Link	Description of Section
4.1	Introduction	A brief overview of this subsection.
4.2	Different Levels of Evaluation	Learn about the differences between feedback and outcome measures, and the varying strengths of evidence.
4.3	Qualitative versus Quantitative	Learn about the differences between qualitative and quantitative data, and which you should use in your program.
4.4	Creating a Survey from Scratch	This section offers tips on how to create a survey from scratch.
4.5	Using a Pre-Existing Survey	This section offers tips on choosing a pre-existing survey for your program.
4.6	Timing	This section discusses such things as the best times to send a survey, and pre-post tests.
4.7	Sampling	This section discusses such things as how many people you should attempt to contact, how to select a sample, and how to ensure randomness.

General Resources:

Title	Description	Format
Conducting Surveys [9]	This webpage talks extensively about what surveys are, and why and how to conduct them.	Guide
Collecting Evaluation Data: Surveys [10]	This PDF is an in-depth guide to all facets of conducting a survey.	Guide

4.1 Introduction

This subsection will cover a form of evaluation that is often used in practice. We will guide you along various survey types, leading you to better understand the kinds that will best suit your needs. Please note that in Step 2 we will be going over the implementation portion of using surveys in evaluation.

4.2 Evaluation Evidence and Types

Feedback versus Outcome Measures

It is common for program evaluation to focus solely on feedback in their evaluation strategies. While participant and stakeholder feedback is an important part of the program evaluation process, programs can benefit from also evaluating participant outcome measures (refer to Step 1A for a detailed explanation of short, medium, and long-term outcomes). Participant outcome measures are measures that analyze the specific outcomes that participants may experience over the course of your program. Please refer to the Foundations section for more information. Participant outcome measures are often tied to the objectives of a program: for example, a program that aims to boost resiliency in participants may want to measure participants' resiliency scores as an outcome measure. Participant outcomes commonly used in evaluating campus community programs may include factors such as:

- Community connectedness
- Perceived social support
- Self-esteem
- Resiliency
- Stigma
- Coping
- College living satisfaction
- Changes to alcohol and drug use
- Distress tolerance
- Emotional regulation
- Perceived stress
- Homesickness
- Academic self-efficacy
- Etc.

Participant outcome measures are important in helping analyze whether specific program objectives have been met. While gathering feedback is another useful tool for program evaluation, it will not necessarily give an explicit or clear measure of the outcome you want to achieve.

Outcome evaluations are not complicated to create. In many cases, a simple pre-posttest, in which participants are evaluated both before and after a program (using the same measure), can offer interesting insights into how your program affects participants. There are a variety of scales, measures, and inventories available online and in other resources that can be used or adapted for your purposes that will measure your specific outcomes or objectives. For more information on outcome measures, see the resources below. Remember that it is perfectly appropriate to evaluate feedback *as well as* outcomes – you do not need to choose one over the other! You can combine several different surveys into one; for example, you can start off with a survey on demographics, then participant feedback, then a few outcome surveys.

The Varying Strengths of Evidence

Claims of the effectiveness of programs can have different levels of strength or evidence backing them up. For example, if a friend told you how effective her program was at getting students to study more often, you would likely believe her more if she had performed a pre-posttest that measured changes in students' study hours. Conversely, you might believe her *less* if she said that she once overheard a student say they study more often. The level of evidence is obviously quite different here!

It is important to think about the claims you make about your program and the strengths of the evidence on which you are basing your claim. Luckily, it can be quite easy to increase the strength of your evidence by choosing good evaluation tools and methods. For more information on this idea, start on page 24 of [this document](#) from the World Health Organization.

Resources:

Title	Description	Format
Choosing Data-Gathering Methods for Your Project [1]	Starting on page 38, this guide talks about when and how to use a pre-test/post-test evaluation method.	Guide
Developing Baseline Measures [11]	The following resource gives a good description of why you should collect a baseline measure (pre/post test), and how to go about doing it.	Guide
Tools, Instruments, & Questionnaires for Research & Evaluation of Intervention Programs [12]	This website contains a comprehensive list of psychological, social, and academic evaluation tools you can use to evaluate your programs.	List of Tools

4.3 Qualitative Versus Quantitative

Another thing to consider is whether you want to collect and analyze qualitative data or quantitative data (or both!).

Qualitative data is made up of words, narratives, and quotes [13], and is usually gained from an open response section on a survey where a participant is free to answer in their own words. It can also be obtained in interviews and focus groups. Please note that certain qualitative methods have idiosyncratic steps for question creation, recruitment, and the like. It may help to skip ahead to Step 3 to inform yourself about the method you wish to choose prior to continuing. **Quantitative data** focuses on numbers and is solely quantifiable rather than narrative [13]. Quantitative data usually results from questions that ask a participant to select an option out of several for their answer (e.g. the commonly used Likert scale, where respondents indicate their level of agreement to a statement using a scale which list a scale of response options ranging from strongly agree to strongly disagree).

Both types of data have pros and cons. Qualitative data is rich and can help provide deeper, more nuanced information on a program from the perspectives of participants and stakeholders. However, it may work better with smaller populations, as analyzing large amounts of qualitative data can be time

consuming and overwhelming. In addition, the analysis can be biased based on the researcher or evaluator’s perspectives [13].

Quantitative data is clear, specific, and can be an accurate and reliable source of information [13]. It also tends to be quick to collect and simpler to analyze using statistical measures or analyses. However, it is also limited in its scope, and may miss out on some of the more complex feedback or insights from participants and stakeholders [13].

Using both qualitative and quantitative methods can be a great solution to help you get the most useful and effective feedback by getting the advantages of both methods. However, you should always consider which methods works better for you and your team, which would give you the answers that you’re interested in, and which is easiest to process and disseminate. These pages on how to analyze [qualitative](#) and [quantitative](#) data may also help you to decide which the right method is for you.

Resources:

Title	Description	Format
Qualitative or Quantitative Data? [13]	This provides a more in-depth explanation of the benefits and drawbacks of using both quantitative and qualitative data.	Guide
User-Friendly Handbook for Project Evaluation [8]	Starting on page 52, this PDF contains an in-depth discussion of the pros and cons of qualitative, quantitative, and mixed-methods.	Guide
Choose Designs and Tool [14]	This Website covers the difference between qualitative and quantitative data and mixed-methods.	Guide
Planning Evaluations [7]	Starting on page 28, this PDF contains some good information on qualitative and quantitative measurements	Guide

4.4 Creating a Survey from Scratch

A survey can sometimes feel overwhelming and confusing; however, keeping a few simple things in mind can help guide you through the process. First, it is important to consider what information you want to collect: what demographics do you care about? Do you want the survey to be anonymous or should you collect names? Do things like age, ethnicity, and gender interest you, or are they irrelevant to your interests? Think carefully about what information is important to you and why. Participants often do not want to answer unnecessary questions, and wading through irrelevant data can be time consuming and confusing for evaluators [15]. Do not cut out necessary questions or areas you think may be important for your analysis, but trim the fat, and cut out unnecessary or redundant questions.

Second, consider the order of your questions. A ‘funnel approach’ is recommended to put participants at ease and encourage thoughtful responses [16]. It starts off with more broad and general questions as a “warm up” and moves into more specific or sensitive questions after that. For example, you may

choose to start off your survey with broader demographic information and general reflection questions, and then move into more detailed questions or scales.

It is also important to consider whether you are making questions required or optional. Most survey software platforms allow you to select whether a question or section is required or optional for participants. Remember though, you cannot force your participants to answer any questions. It is best practice to have the option of “prefer not to answer” as a choice for demographics such as gender, ethnicity, and the like.

Finally, it is also important to consider the usability of your survey. How long does it take to answer? Is it easily navigable? Can participants save answers to questions and come back to finish their response later? Consider the functionality of your survey, and what features are important for you to include or not include.

Best Practices for Writing a Survey

Some best practices for writing your own survey include [17]:

- Write clear questions, written with the respondent in mind (i.e., would this make sense to you if you were taking the survey without any background context?).
- Keep questions brief and succinct and break them up into components rather than having questions that ask too many things. Each question should focus on one thing, rather than having multiple questions embedded (e.g. “Do you like orange juice and why?” vs. “Do you like orange juice (Yes or No)?” and “If you do like orange juice, why do you like it?”).
- Think about what questions people will want to answer, how many questions they will be willing to answer, and how long your respondents are most likely to be willing to fill out a survey. Most people do not want to answer open ended questions on a survey (these can be left to interviews); instead, “guided” questions are recommended (e.g., “What are three things you liked about the event? What are three things you would change about the event?” instead of “What did you like or not like about the event?”).
- It is better to list all possible options than to ask for an open-ended response, even when looking for feedback (e.g., instead of asking “what did you like most?”, list as many options as you can, like “the food”, “the presenter”, etc.). Reserve an open answer for when you really need it and will get a lot from it (e.g., “is there anything else that you wanted to comment on?”)
- Shorter questions usually yield a better response rate.
- Provide definitions to keep all respondents on the same page and prevent confusion.
- Make sure you are not asking leading questions (questions that are worded to lead a participant to answer a certain way).
- Get several people to “test run” the survey and give you feedback on how they interpret the question. This will help make sure everyone is reading your questions correctly.
- Once you’ve decided on a scale (e.g. a 5-point Likert scale), stick to it for the whole survey so you can compare between questions and across time.
- When creating a Likert scale, be mindful of the following [18]:

- Questions should address only one issue (i.e., “How much do you agree or disagree that oranges are tasty and nutritious?” compared with “How much do you agree or disagree that oranges are tasty?”). The latter question is preferable as someone might think oranges are nutritious but not tasty. If you are interested in both qualities, ask two questions.
- Do not use quantitative statements (i.e., “How much do you agree or disagree that evaluation is always helpful?” compared with “How much do you agree or disagree that evaluation is helpful?”). Omitting the “always” is the preferred format.
- Do not use leading questions (i.e., “Evaluating is more helpful than not evaluating in improving programs” and “Not evaluating is more helpful than evaluating in improving programs”; each of these leads participants to think a certain way).
- The following descriptions of choices are helpful labels for Likert questions: disagree strongly, disagree, undecided, agree, agree strongly.

Please note that for research purposes there will be additional considerations that need to be kept in mind (such as ethics, leading questions, etc.). For more information on research surveys, check out our resources section.

Typical Components of a Survey

The core components of surveys will often include several key areas, including:

1. **An informational welcome section.** This should include information on the survey, why participants are being asked to fill out the survey, the risks and benefits of completing it, and approximately how long it will take. Any incentives for completing the survey (e.g., the chance to win a draw for a gift card) should also be listed here. Contact information for the stakeholder responsible for administering the survey should also be listed here. The purpose of the survey and how its results will be used should also be listed here. If using an online survey, information on how to navigate the survey should also be included in this section (e.g., if participants can go back to earlier pages, if answers can be saved and returned to later, etc.). It is important to note that university staff at UCalgary are never allowed to receive cash or cash equivalent incentives
2. **Introductory questions and demographics.** This section should include any demographics you are interested in collecting, participant identification numbers or codes (to be able to link pre- and post- program surveys to one another), and general “warm up” questions to get respondents thinking about their feedback for the program.
3. **Feedback and/or outcome measures.** This section may include feedback questions and outcome measures such as scales or inventories.
4. **Final questions and additional comments section.** Any final questions relevant to your analysis or program planning, such as “would you participate in this program again?” , or spaces for additional comments, can be placed in this section. Incentive contact information, such as a space for email address for participants interested in signing up for draws can also be placed in this section.

5. **Debrief information section.** This section should include a thank you message, a reminder on how their feedback and information will be used, and contact information for the survey administrator.

Read through some of the resources below to learn more about selecting research questions and building a survey.

Resources:

Title	Description	Format
Choosing the Right Evaluation Questions [19]	This PDF is a guide on how to choose the right evaluation questions.	Guide
Rating Scales [20]	This PDF contains advice on creating your own rating scale.	Guide
Sample Key Evaluation Questions [21]	See this PDF for some examples of typical evaluation questions.	Samples
Collecting Evaluation Data: End-of-Session Questionnaires [22]	This is a comprehensive PDF that discusses how to create a good feedback questionnaire and includes a lot of sample questions.	Guidebook
Questionnaire Design: Asking Questions with a Purpose [23]	Another PDF on how to construct a questionnaire and what kinds of questions you can ask.	Guidebook
How to Use SurveyMonkey [24]	This video walks you through how to set up a survey on SurveyMonkey, a popular survey creation and administration site.	Video
Demystifying Survey Data Collection [25]	This webpage includes a free Webinar or PowerPoint presentation you can flip through on your own time. The first half of the presentation discusses how to create a survey.	Video or PowerPoint
Creating Good Questions [26]	This website provides a brief description of how to create good questions for your survey.	Guide
Likert Items and Scales [18]	An indispensable guide for making sense of Likert scales.	Article

4.5 Using a Pre-Existing Survey

There are two types of pre-existing surveys you may be using: a survey written by a previous program coordinator or a pre-existing validated survey. Pre-existing validated surveys are surveys that have been demonstrated in literature to have strong validity (the survey measures what it actually sets out to

measure) and reliability (the survey has consistent and stable results) in what they set out to measure (such as resilience, happiness, etc.). It's always good to look for surveys that have been used before for several reasons: surveys that have been administered in previous years can offer you the option of monitoring certain statistics or objective measures from year to year, surveys that are commonly used for similar programs are likely to have good psychometric properties, and they can also give you an idea on what questions are important for you to ask in your own survey [17].

While it is fine to adapt previously-used surveys developed by previous program coordinators, it is strongly recommended you choose a survey that has been statistically validated in some way [17]. That may mean you adapt previously-used surveys to include validated measures or scales, or adapt a validated survey to include parts of previously-used surveys. **The most important thing to remember is to not use a survey only because it is what was used in the past.** While it may seem like the easiest option to simply use what has been used in past years, it is important to consider what changes might be necessary or pragmatic to make, and to adjust or change evaluation methods based on what you and stakeholders determine to be the best option.

Using a previously-used survey

The benefit of using a pre-existing survey is that you will be able to compare your data year-to-year to see how responses change or to identify trends. This can be helpful for seeing on a large scale how changes affect your data and how data compares year-to-year. Feel free to rewrite or add new questions to a pre-existing survey, but keep in mind that anything you change or remove will not be able to be compared to previous data. This is where a good evaluation plan comes in – if you plan well ahead of time, you will not need to make extensive changes to your survey! For information on coming up with an evaluation plan, see [here](#).

Using a validated survey

Validated surveys have the benefit of having strong psychometric properties. This means that they measure what their creators say they measure, as well as measuring that thing consistently over time and across populations. They're also pre-established, so you don't have to invest much time in creating them! Validated surveys can be compared to other programs and other institutions that are using that same survey. In so doing, you can compare how your program compares with other work being done on an international scale. For resources on how to choose validated surveys and where to find them, see the resources below. Note: if you adapt the wording of validated measures, you no longer know that the instrument is still measuring the same construct or that it can do so reliably. Further psychometric testing would be required.

Resources:

Title	Description	Format
UCalgary Resources and Beyond	This is a list of commonly used outcome measures.	Chart
General Rating Criteria for Evaluating Scales [27]	This chart explains how to tell if a scale has good validity and reliability. You can use it to judge any scales that you find that report validity and/or reliability. You	Chart

	can also try to find journal articles on the scale that test its reliability/validity.	
Planning Evaluations [7]	Starting on page 32, this PDF contains some good information on reliability and validity.	Guide
Tools, Instruments, & Questionnaires for Research & Evaluation of Intervention Programs [12]	This website contains a comprehensive list of psychological, social, and academic evaluation tools you can use to evaluate your programs	List of Tools

4.6 Timing

There are many different times that you can collect data from participants, including before, during, and after. The resources below discuss these issues in more detail. The combination of before and after can give you a strong sense that your program is doing what you wish for it to do. Only having before or after measures does not give you enough information to make such a claim. Adding a during evaluation can give you an extra time point to determine whether your program is making an impact, but it takes more time and makes participants do more work. Weigh the cost and benefit of this idea with your stakeholders to see how to go about this.

Carefully consider when you are sending out surveys or asking people to come in for interviews. Your evaluation will get better results if you plan your collection around the participants, rather than an internal deadline [17]. Make sure to avoid sending out the evaluations during any holidays, long weekends, or the summer months; many people are away and/or busy, and you will often not get a good return [17]. Surveys should also be conducted as soon as possible after the event to facilitate participant's recollection of the event and their opinions [17]. See [Step 2](#) for more information. In the university context, it is important to consider the academic cycle of mid-term and final exams as well as breaks.

Resources:

Title	Description	Format
Developing Baseline Measures [11]	The following resource gives a good description of why you should collect a baseline measure (pre/post test), and how to go about doing it.	Guide
Choosing Data-Gathering Methods for Your Project [1]	This PDF includes discussions on pre-test/post-test evaluations	Guide
User-Friendly Handbook for Project Evaluation [8]	Starting on page 36, this PDF discusses appropriate timing, frequency, and sequencing of data collection.	Guide

Step 4: Choose Design and Tool [14]	This website talks about when you should collect data.	Guide
Planning Evaluations [7]	Starting on page 43, this PDF contains some good information on time frames for data collection.	Guide

4.7 Sampling

Depending on the type of evaluation and your resources, it is important to collect data from as many members of your program as possible [8]. However, if your program has several hundred participants, it can be pragmatic to select a sample from the population to evaluate, if the sample is chosen at random [8]. It is important to ensure that when sampling, what is most “practical” is not necessarily the most accurate; simply sending surveys to participants you know are most likely to respond may not be appropriate, as it will not accurately reflect your entire population and may skew your data. For example, consider the kind of results you would get if you sent out surveys to the participants you felt were the most engaged and enthusiastic. While you are more likely to get responses and feedback from them, if these participants seemed to enjoy the program more than others, they are likely to give positive feedback, which may cause you to miss out on valuable information on how to improve your program for future years.

It is important to follow up with any participants that do not respond to your initial contact – their information is valuable, and excluding those people can have the effect of skewing your data [8]. Be open to rescheduling or adding more interviews or evaluation sessions to better accommodate your participants if necessary [8]. The recommended response rate is at least 70% to draw significant conclusions from the data that can be representative of the entire group [17]. But this is aspirational; do what you can with what you have.

You should also attempt to get feedback from any participants who dropped out of your program: they may have valuable information that will help improve your program, including why they dropped out, barriers to participation, and potential program improvements [8].

Beware of drawing general conclusions based on a small, non-random sample: the smaller the pool of participants, the more cautious you should be about generalizing.

So How Should I Sample?

Each program coordinator will have to make individual decisions on which participant groups they will sample for evaluations and make considerations on how to sample participants. Some things to consider include:

- How am I contacting participants for surveys, focus groups, and interviews? How am I advertising them? Are there any groups that may be more likely or less likely to see these advertisements?
- Is there a core group of respondents who tend to always respond to surveys or participate in interviews or focus groups?

- Do I have the most up-to-date contact information for participants? I am contacting them via their preferred method of communication?
- Am I relying on just one method to sample participants? Should I broaden the ways in which I am reaching out to participants to engage in an evaluation, like social media, posters, or other advertisements?
- If I am using a random sample, how is that sample being collected? Am I using validated software to select random participants?

Resources:

Title	Description	Format
Step 4: Choose Design and Tool [14]	This website talks about who you should collect data from.	Guide
Planning Evaluations [7]	Starting on page 44, this PDF contains some good information on sampling.	Guide

5. Evaluation Using Interviews or Focus Groups

Here we will cover the theory behind interview and focus groups; in Step 2, we will discuss how to implement them. An interview is a conversation with the purpose of providing information or feedback on a specific topic [28]. It positions the interviewee(s) as the expert and the interviewer as the student or learner. It provides an opportunity for participants to share their expertise on a topic area [29]. A focus group is a group discussion amongst a group of participants and facilitators (usually, but not always, a program evaluator) [29]. Focus groups are an opportunity for participants to openly and freely express opinions and engage in discussion in a non-threatening environment [29].

There are three main types of interviews: **structured**, **semi-structured**, and **unstructured** [30]. Structured interviews are interviews in which a pre-written script or list of questions is used and the interviewer sticks to this script completely. All participants are asked the same questions, and there is no follow-up or further discussion outside of the scripted questions [30]. An unstructured interview is where there is no list of questions; the interviewer and participant discuss whatever they want that is related to the topic [30]. A semi-structured interview is somewhere in between; the interviewer has a list of questions to ask, but they are not confined to discussing only those questions [30].

Most focus groups are like **semi-structured** or **unstructured interviews**, as they often have a main topic or area to discuss, which may include pre-created questions, but allow participants to engage in a relatively open discussion.

Writing Questions

Tips for writing interview/focus group questions [28]:

- Ask clear and simple questions. Be careful to not ask more than one question at a time – separate each issue into its own question.
- Keep questions as short as possible to avoid overwhelming the interviewee

- Start with the most simple and easy-to-answer questions and build to the more complex ones; this will give your interviewee a chance to “warm up” and feel more comfortable with answering the questions.
- Avoid asking questions that make the interviewee feel attacked or offended.
- Ask questions that encourage complete responses (for example, by asking for additional information or follow-up questions).
- Think about whether your questions may prompt socially-acceptable answers instead of honest ones. Keep in mind the social pressures and employment pressures your participants could be experiencing. One way to avoid this is to start by telling the participant what you have heard other interviewees say about an issue, and then asking for their own opinion. Another option is instead of asking what they think is bad and what they dislike about the program, ask them what areas need improvement, what gaps can be filled, or how can we make this experience better [17].

Best Practices for Planning Interviews/Focus Groups

- Keep your interviews as short as possible to retain the attention (and mood!) of your interviewee, while still capturing all relevant information [28].
- Be mindful of factors such as the time and location of your focus group or interview, and the needs of your participants. For example, if you are conducting a two-hour focus group over lunch time, it may be worthwhile to provide food for participants [28].
- It is a smart idea to do a trial run of your interview questions to see how long the discussion could feasibly take; this will allow you to shorten the length if necessary and will give you a better idea of how much time you will require of the interviewee [17].

Resources:

Title	Description	Format
Step 4: Choose Design and Tool [14]	This website provides some information on how and when to conduct interviews.	Guide
Conducting Key Informant Interviews [31]	This PDF is an in-depth discussion of interviews, including what is an interview, when to use interviews, advantages and limitations, steps, etc.	Guide
Creating Good Questions [26]	This website provides a brief description of how to create good questions for your interview or focus group.	Guide

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Step 2: Collecting Your Data

Table of Contents

	Description of Section	Section Title and Link
1.	Introduction	A brief overview of Step 2.
2.	How to Conduct a Survey	This section contains information about how to effectively conduct a survey.
3.	How to Conduct an Interview	This section contains information about how to effectively conduct an interview.
4.	How to Conduct a Focus Group	This section contains information about how to conduct a focus group.
5.	Encouraging Participation in Evaluation	How can you encourage people to participate in your surveys? This link covers important points on increasing response rate.
6.	Inputting and Storing Data	This section contains information on how to input your data into a data storage system and store it securely.

General Resources:

Title	Description	Format
User-Friendly Handbook for Project Evaluation [1]	Starting on page 39, this PDF discusses many different ideas regarding data collection.	Guide
Step 4: Choose Design and Tool [2]	This website has a lot of information about how to collect data.	Guide

1. Introduction

In Step 2, you will explore ways to move beyond the theory to the practice portion of conducting various kinds of evaluation designs. You will explore various questions that discuss the execution component of program evaluation. While surveys, interviews, and focus groups are frequent forms of data collection, there are numerous ways to collect information, and a multitude of ways in which to conduct data collection. In this section, we will go through some of the ways in which you can collect data. However, it is important to remember that you should ensure that your methods of data collection fit your needs; these methods are adaptable based on your program objectives and goals.

2. How to Conduct a Survey

There are two main ways of conducting a survey: **in person** or **online**. There are pros and cons to administering surveys in person or online. The benefit of conducting surveys in person is that participants are far more likely to respond. However, online surveys have the benefit of taking fewer staff resources to administer, and the potential to reach more individuals.

With online surveys, using platforms such as SurveyMonkey or Google Forms can aid you in creating the survey. It is extremely important, if you choose this means of delivery, that you send out your survey as soon after the event, workshop, or otherwise as possible. The longer you wait, the more likely it is that participation will decrease. Participants may also forget valuable feedback, or forget details that could be important. To add, it may help to remind participants before they leave that you will be sending this survey and share with them what that information will be used for. You can also schedule surveys to be sent out via email to participants right after an event, which can help save valuable time and energy.

For more information on how to conduct a survey, see the resources below.

Resources:

Title	Description	Format
Conducting Surveys [3]	This webpage talks about ways of distributing surveys.	Guide
Collecting Evaluation Data: Surveys [4]	Starting on page 9, this PDF includes information on how to implement a survey.	Guide

3. How to Conduct an Interview

Interviews can be an excellent method to collect information-rich data, which can be incredibly useful to improve and understand your program.

Here are some tips for conducting interviews:

- Try to secure a private room in which to meet. If this is not feasible, collaborating with your participant on where they would feel comfortable meeting will help increase trust prior to starting the interview.
- Feel free to tape record your interviews if the interviewee has given clear (written) permission beforehand. Otherwise, take very detailed notes.
- Never quote someone as saying something unless you are positive you have written it down correctly and verbatim. If you are not sure, ask them to repeat it back to you.
- Depending on the type of evaluation, you will want to make sure you and your evaluation team are asking the same questions in the same order to standardize across participants: the ordering and wording of questions can affect the answers you get. This can be done by creating a standardized set of questions to be used in every interview, and if applicable having a meeting with all team members ahead of time to discuss interview strategies. Ensure your whole team is on the same page before starting any in-person interviews!

- If participants do not wish to answer a question, that is alright. That is their choice to make; just move on to the next one.
- During the interview, thank people for coming, remind people of the purpose of your conversation, and tell people what their data will be used for and who will see it.

Resources:

Title	Description	Format
Conducting Interviews [5]	This webpage talks about why and how to conduct interviews	Guide
Conducting Key Informant Interviews [6]	This PDF is an in-depth discussion of how to conduct interviews.	Guide

4. How to Conduct a Focus Group

Focus groups are a great way to have many people participate all at once in sharing their ideas. The benefit of focus groups is that people can support each other in becoming open. It can also save you time in conducting interviews! However, some participants may not feel comfortable in a group setting, and may not share as much. Focus groups also take time to organize. That said, here are a few ideas for getting a focus group going:

- Ensure you have a dedicated location for people to meet that is large enough to accommodate all expected participants. Send out the meeting time and location ahead of time with all details on the focus group, and remind participants the day before if necessary.
- Feel free to create a script of what you want to say ahead of time.
- Ensure you have a selected a strong leader for the focus group who is knowledgeable and confident in leading group discussions.
- Greet people as they enter and thank them for coming.
- Remind people of the purpose of the conversation.
- Tell people what the data will be used for and who will see it.
- Create or remind people about any ground rules.
- Ask your well-developed questions. Remember, the ordering and wording of your questions can influence your answers.
- Give everyone space and time to answer. On the other hand, respect anyone’s decision to not answer certain questions if they don’t want to.
- Ensure that all participants have the opportunity to answer questions, and that one individual is not dominating all of the conversation. A light prompt asking others on their thoughts, or redirecting the conversation to the entire group can be helpful tools!
- Apart from that, the same rules for conducting interviews apply here too!

Resources:

Title	Description	Format
Conducting Focus Groups [7]	This resource provides not only an overview of focus groups as a method, but gives step-by-step ideas of what to do, as well as checklists of suggestions.	Guide
Planning Evaluations: Focus Group Method [8]	Starting on page 50, this pdf discusses all aspects of conducting a focus group.	Guide
Focus Group Interviews [9]	This PDF discusses how to conduct a focus group.	Guide

5. Encouraging Participation in Evaluation

Many people have asked how to increase response rate for their evaluations. Here are some ideas of how to encourage participation in evaluation:

Remove Fear of Participating

First, it is vital to remove any fears people may have about participating in your evaluation. Let people know that their responses will be private and not used to identify them in any way. If pseudonyms are used, ensure participants any revealing information will not be disclosed. If in doubt about questions of confidentiality, please consult with the relevant Research Ethics Board.

Second, remind participants that there are no “wrong” answers and that they will not be judged for their responses. Collect responses in a private, opaque box where responses cannot be seen from the outside. Ensure staff members or other pertinent people are not hovering around people that are filling out surveys. Allow people as much privacy as possible to make them feel comfortable and relaxed, and that their answers will remain private.

Write a Good Introduction

Introductions are important for increasing the likelihood that participants will respond to your survey or initial contact. Always mention *why* participants should answer the survey, what value the responses will have to both you and them, and that their honest opinion/honest responses are important and appreciated. Introductions should also include the following information [10]:

- An explanation of the purpose of the evaluation;
- Who will see and use the data collected from the evaluation;
- Who is funding or sponsoring the evaluation, if anyone; and
- Any benefits of the survey, and benefits to the respondent.

Incentives

Another way to encourage participation in evaluation is through using incentives. Here are some points about incentives that may prove helpful [10]:

- Incentives improve response rate for all types of evaluation.
- Examples of incentives can include gifts, food, prizes, financial rewards, and the like. Note: cash or cash equivalents (e.g. gift cards) cannot be used as incentives for university employees.
- The longer and more complicated a survey is, the more effective incentives are at increasing response rates

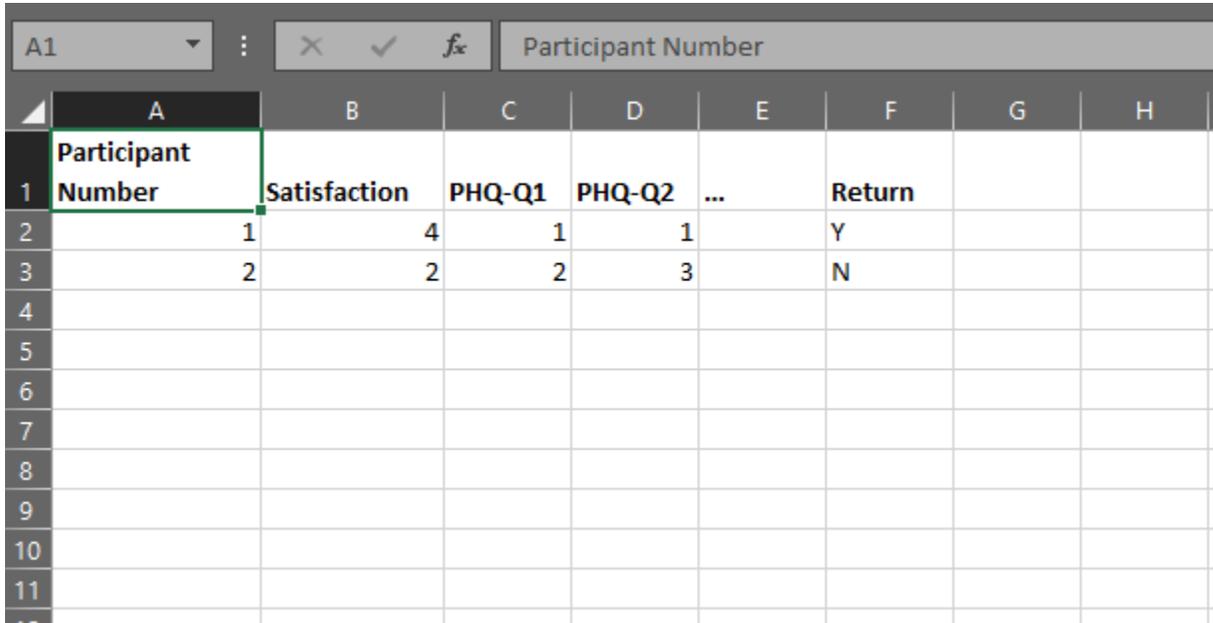
For more information on the issue of increasing response rate, see the resources below.

Resources:

Title	Description	Format
Survey Response Rate Trends and Enhancement Techniques [11]	See this comprehensive PowerPoint presentation on how to combat declining survey rates. While the first half of the presentation is aimed at telephone surveys, much of the advice is transferrable.	Guide
Collecting Evaluation Data: Surveys [4]	Starting on page 15, this PDF includes information on how to get a good response to your survey.	Guide

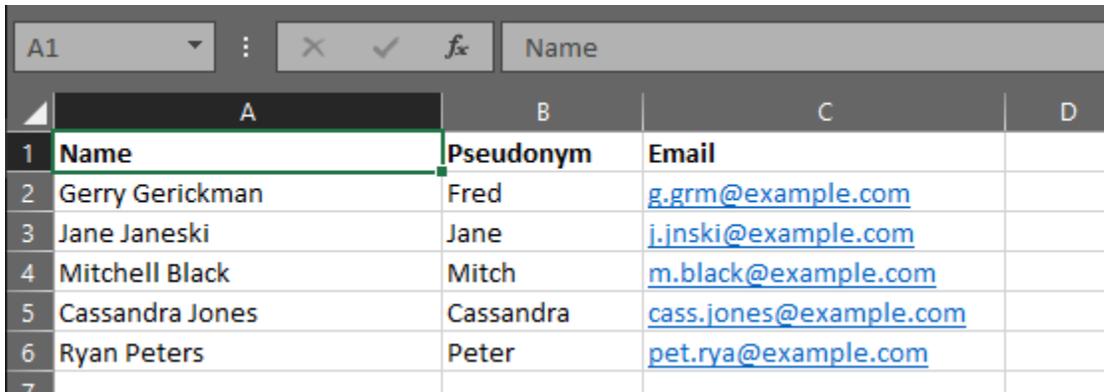
6. Inputting and Storing Data

Congratulations! You have successfully obtained survey data or held interviews or focus groups. What now? It is now time to engage in data storage and retention. The most effective way of storing data is ensuring you have a strong data management system. Microsoft Excel can be an excellent system for data storage for your team: it is commonly used, easily accessible, and easy to understand. However, it is important to note that individual cells can easily be deleted or over-written, so it's good practice to save multiple, dated versions so you can go back and check previous versions in the case of any missing or suspicious-looking data. University of Calgary employees also have access to [data management software](#) such as SPSS. Survey data can be inputted into a new excel file. The first column could have the label of "participant code or number." Subsequent columns take the name of your survey questions, in the order they are found on the document itself. For instance, if the first question is "how satisfied were you with this workshop?", the name for the second column may be "Satisfaction." Each prompt should have its own column, even if it is from the same questionnaire. For instance, on the Patient Health Questionnaire-9, the first prompt is "little interest or pleasure in doing things," while the second one reads "feeling down, depressed or hopeless," and on it goes. Let's say the last question on your survey is "would you take this workshop again?" Assuming the question about satisfaction is still the first question on your survey, your column will read "Participant Code," "Satisfaction," "PHQ-Q1" (for "question 1"), "PHQ-Q2," ... (continuing with the other 7 questions on the PHQ-9), "Return." Here is an example:



	A	B	C	D	E	F	G	H
	Participant Number							
1	Number	Satisfaction	PHQ-Q1	PHQ-Q2	...	Return		
2	1	4	1	1		Y		
3	2	2	2	3		N		
4								
5								
6								
7								
8								
9								
10								
11								

In terms of questionnaires and focus groups, it will help to create a password-protected master file that contains participants' real names and their pseudonyms. Sometimes, even if you offer the option of a pseudonym, participants will be comfortable with using their real name. In creating a master file, you can always link them back together, should you need. Creating an excel sheet is helpful in this regard as well. Have a look below:



	A	B	C	D
1	Name	Pseudonym	Email	
2	Gerry Gerickman	Fred	g.grm@example.com	
3	Jane Janeski	Jane	j.jinski@example.com	
4	Mitchell Black	Mitch	m.black@example.com	
5	Cassandra Jones	Cassandra	cass.jones@example.com	
6	Ryan Peters	Peter	pet.rya@example.com	
7				

When it comes to interviews and focus groups, it may help to have a separate folder for each participant (to store recordings), with transcriptions contained in the same folder for ease of access. Here is an example:

This PC > DATA (D:) > Example >

<input type="checkbox"/> Name	Date modified	Type	Size
<input type="checkbox"/>  Cassandra & Ryan	29/08/2017 8:02 PM	File folder	
 Gerry Gerickman	29/08/2017 8:02 PM	File folder	
 Jane Janeski	29/08/2017 8:02 PM	File folder	
 Mitchell Black	29/08/2017 8:02 PM	File folder	
 Transcriptions	29/08/2017 8:02 PM	File folder	

Resources:

Title	Description	Format
Demystifying Survey Data Collection [12]	This webpage includes a free Webinar and a PowerPoint presentation that discusses data collection including how to input data. The last link is a copy of the excel sheet they discuss in the presentation.	Video or PowerPoint

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Step 3: Analyzing Your Data

Table of Contents

	Description of Section	Section Title and Link
1.	Introduction	A brief overview of Step 3.
2.	Quantitative Data Analysis	Statistics: guides and tips for making this easy.
3.	Qualitative Data Analysis	You have open-ended written responses or you've conducted interviews or focus groups. What now?
4.	Mixed Methods	Combining statistics and qualitative methods!

General Resources:

Title	Description	Format
Collecting and Analyzing Evaluation Data [1]	This is a handy guide to help distill down data analysis into easy to understand language.	Guide

1. Introduction

You have collected your data. You have it organized in excel sheets and folders. Now what? It is time for analysis! While this step in the process can be daunting to even think about, here are a few things you can do to make all this far less cumbersome!

First, return to your original evaluation question or questions. What did you want to learn and find out? What did you want to use this information for? Keep these questions in mind as you analyze. Next, think back to the methods you used to collect data: were they qualitative, quantitative, or both? For a description of the difference between qualitative and quantitative data, see [Step 1B](#). Once you have reviewed this information, head to the relevant sections below to learn more about how to analyze.

2. Quantitative Data Analysis

There are two basic ways of working with quantitative data: descriptively and inferentially [2].

Descriptive statistics are about painting a broad picture of the data. An example of descriptive statistics includes the mean, median, and mode. **Inferential statistics**, on the other hand, aid in getting beyond surface level data. They allow you to infer the underlying meaning from the data and uses ideas such as significance. T-tests and chi-square tests are a fantastic start to your journey into inferential statistics.

Check out the resource below to learn how to analyze your quantitative data using statistics! In addition to the resources below, it may help to consult with researchers and subject matter experts on how to conduct t-tests and more complicated inferential statistics.

Resources:

Title	Description	Format
Descriptive Statistics [3]	This resource will help you learn how to do descriptive statistics with ease.	Guide
How to Do T-tests [4]	A course on how to conduct t-tests (an inferential statistic).	Course
Basic Data Analysis [5]	This YouTube video contains great information on how to analyze quantitative data.	Presentation
Using EXCEL for Analyzing Survey Questionnaires [6]	This PDF describes how to analyze quantitative data using excel.	Guide
Analyzing Quantitative Data [7]	This pdf from the University of Wisconsin-Extension is a great guide on how to analyze quantitative data.	Guide
Analyzing Quantitative Data for Evaluation [8]	This PDF from the Centre for Disease Control is a great guide on how to analyze quantitative data.	Guide
Demystifying Survey Data Collection [9]	See this PowerPoint presentation for some tips on coding your responses, setting up your data in excel, and running some preliminary analyses.	Presentation
Collecting Evaluation Data: Surveys [10]	On page 17 this PDF discusses how to interpret results from your survey when you have a low response rate.	Guide

3. Qualitative Data Analysis

Qualitative analysis looks at the words, ideas, and meanings that come from open-ended survey questions, interviews, and focus groups [2]. You can also do a qualitative analysis of other sources of data, such as your program description, logic model, and meeting minutes if you believe this will add value to your understanding of your program. There are two methods that we recommend for program evaluation: thematic analysis and the Enhanced Critical Incident Technique (ECIT).

Thematic analysis is often a go-to method for a first-time qualitative analysis. This method is relatively simple for beginners, and can provide valuable insight into the main themes of evaluation feedback. The link below provides a step-by-step description of how to use this method.

The **Enhanced Critical Incident Technique (ECIT)** is unique in its use in program evaluation. What sets it apart is its explicit focus on what participants think went well and did not go well in addition to what they wish was in the program but was not. These are, after all, sometimes the very questions that program coordinators want to tackle!

Title	Description	Format
Thematic Analysis [11]	Written by the authors of thematic analysis, this PDF is a step-by-step guide on how to use thematic analysis to analyze your quantitative data.	Guide
Enhanced Critical Incident Technique [12]	Written by the authors of the method, this PDF is a summary of the step-by-step process needed to use the ECIT.	Guide
Tips for Qualitative Data Analysis [13]	This 1-page PDF contains very useful tips to consider when conducting qualitative analysis.	Guide

10 Steps to Make Sense of Answers to Open-Ended Questions [14]	This short PDF from the University of Wisconsin-Extension has a lot of good ideas about how to analyze qualitative data.	Guide
Analyzing Qualitative Data [15]	This PDF is an in-depth discussion of all aspects of qualitative analysis.	Guide
Analyzing Qualitative Data for Evaluation [8]	This short PDF from the Centre for Disease Control has a lot of good ideas about how to analyze qualitative data.	Guide
Sample Data from Open-Ended Questions [16]	This PDF shows an example set of qualitative data and how it would be analyzed.	Example

4. Mixed Methods

Mixed methods analysis involves using both quantitative and qualitative methods within the same evaluation. It takes what you have learned from qualitative and quantitative analysis above [2]. It is typical for some data in program evaluation to be quantitative and some qualitative. For example, a survey may include quantitative data, such as rating an event or program on a 1-5 Likert scale, and qualitative data, such as asking respondents to write what they liked or did not like about an event. Read through the resource below will help with getting the gist of this evaluation method.

Title	Description	Format
Mixed Methods [17]	Quick summary of the different ways mixed methods can be used and made sense of.	Guide
User-Friendly Handbook for Mixed Method Evaluations [18]	This PDF contains an excellent guide to mixed methods evaluation. Just scroll down and click on whichever chapter sounds good to you, and you will be directed to a PDF of that chapter.	Guide

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Step 4: Using Your Findings

Table of Contents

	Section Title and Link	Description of Section
1.	Introduction	A brief overview of Step 4.
2.	Writing Reports and Presentations	Sharing your findings with stakeholders can be an important part of using your findings. In this section, we help you with this important step of the process.
3.	Improving Your Program	Your findings are key indicators of the effectiveness and health of your program. Feeding back what you have learned can mean the difference between a program that stagnates and a program that shines!
4.	UCalgary Brand Standards and Templates	If you wish to report and disseminate findings using University of Calgary branding and templates, look no further!

General Resources:

Title	Description	Format
Evaluation Reporting: A Guide to Help Unsure Use of Evaluation Findings [1]	In this guide, you will find a quick summary of all the contents that we write about below. Very accessible and navigable. Provides a helpful checklist!	Guide

1. Introduction

In Step 4, we will cover the last step of your evaluation plan: using your findings. Here, we will discuss writing reports and creating presentations, disseminating your work, and improving your program. We will conclude with University of Calgary branding standards.

2. Writing Reports and Presentations

Table of Contents

	Subsection Title and Link	Subsection of Section
2.1	Why Write a Report?	Simple question, simple answer.
2.2	Disseminating Your Report	The what and how of dissemination.
2.3	Helpful Tips	Just a few quick tips on helping you get started.
2.4	Typical Sections of a Report	A breakdown of sections you'll find in a program evaluation report.
2.5	Presenting Data in Tables	Making your findings understandable involves simplifying them into accessible chunks. Here we show you how to go about this.

2.6	Presenting Data in Charts	This section covers different forms of charts to make data presentation accessible.
2.7	Resources for Reports and Presentations	A handful of resources for this section.

2.1 Why Write a Report?

Evaluations are only helpful if the results are actively used and processed. Evaluation reports allow you, as the main evaluator or program coordinator, to ensure that your data and analysis are presented to key stakeholders, and that relevant discussions can be held in a timely manner. Evaluation reports typically take the form of written documents, which provide a strong foundation that you can adapt into presentations, updates at meetings or a newsletter, applications for further funding, and so on depending on the need. Reports can be as long or short as necessary based on the context of your project and the needs of your audience.

Evaluation reports are also extremely important to program succession planning. Reports on your evaluation, its methods, the resources and individuals involved, the analysis, and resulting discussions can be extremely helpful to future program coordinators and staff members. Reports may even be disseminated to other units to help them better understand your program or provide inspiration for effective program planning.

Reporting is a vital part of the evaluation process. Do not let your data sit on the shelf: make sure it is used and used strategically.

2.2. Disseminating Your Report

There are some benefits to disseminating your evaluation work, including helping other programs evaluate or improve their programs, increasing awareness about your program to potential participants, increasing visibility of your work to funding organizations and management, and allowing others to build upon or use one of your strategies or programs [2].

There may be many people interested in your evaluation results, or who may require a copy, including:

- Funders or grant administrators
- Management
- Government
- Program stakeholders (e.g., team members, participants, etc.)
- The broader social community
- The scientific community

If you are considering publication or participation in a conference, your first step is to find out exactly what is required of you. Each conference or journal usually has its own rules as to what they require from a report or presentation, therefore you'll need to find their website and locate the relevant submission information. Below we list a few ideas for disseminating your work more broadly.

Resources:

Title	Description	Format
Disseminating Program Achievements and Evaluation Findings to Garner Support [3]	This PDF discusses the how, why, what, and when of disseminating your results.	Guide
How to Give a Killer Presentation [4]	This Harvard Business Review article provides some broad ideas on how to create attractive and accessible presentations.	Article
Ten Tips for Presenting a Conference Paper [5]	Ten quick tips on the dos and don'ts of conference presentations.	Article
Writing for an Academic Journal: 10 Tips [6]	This is a 10-step run-down to writing for academic journals.	Article
10 Tips for Writing a Truly Terrible Journal Article [7]	What not to do when writing a journal article.	Article
Writing a Journal Article [8]	This piece contains a breakdown of the various sections of a journal article.	Article
Template for Strategic Communications Plan [9]	This handbook will guide you through the A-Z of effective communication for your program evaluation. Scroll down and download the "Template for Strategic Communication Plan."	Guide

2.3 Helpful Tips

Before getting started on your report, consider some of the following:

- You may need to write slightly different reports for different audiences, depending on how much they may want or need to know and their familiarity with the subject. For example, your manager may be interested in the detailed report, but participants may only be interested in (or allowed to see) the general conclusions, and leaders may be interested in a one-page summary or a slide in a presentation.
- Consider what you should include in a report, executive summary, or presentation based on what that audience might be interested in [2].
- Almost always, the shorter the better [10].
- Be careful with using complicated language and jargon. Write with your audience in mind. Consider whether they have the same knowledge of this subject that you do? If not (or if you are not sure), consider putting in more definitions and simplifying your language [2].
- Try test-running your report or presentation with some colleagues or non-subject matter experts. They will be sure to give you great feedback!

2.4 Typical Sections of a Report

Each evaluation report will look different depending on your program context, and the needs of your audience. Reports generally contain some or all the following information [2]:

1. **Background:** this section should contain information about the program (e.g., objectives, activities, resources, session length(s) and structure, location, target audience, identification

- of relevant stakeholders, expected outcomes, etc.) and any other contextual information that a reader would need to know about.
2. **Identification of Evaluation Questions:** this section should contain information about what your main program evaluation questions were and why you found it important to ask them. Consider putting surveys and interview questions in an appendix.
 3. **Evaluation Procedures:** this section should contain information about what evaluation methods and tools were used and how the evaluation was conducted (i.e., when, where, by whom, etc.).
 4. **Data Analyses:** this section should contain a description of what kind of analyses were conducted on the data, why that analysis technique was chosen, and who performed the analyses. If necessary, this section should also contain any explanations of how data was cleaned or what data was removed and why.
 5. **Results:** this section should contain all the results from your data analyses. Remember to include all findings, even negative or inconclusive ones, to ensure you are painting an accurate picture of the results.
 6. **Limitations:** Here you should describe any known or possible limitations to your findings. For example, if you had an extremely low response rate, mention that here, how that might affect your results, and why you think it happened. If you only received responses from people you knew beforehand or only received responses from one particular demographic, or if something went wrong during a step in the evaluation process, those would all be things to mention here.
 7. **Discussion/Conclusions and Recommendations:** in this section, you should talk about any conclusions you can draw from your results. You can include a summary of what you learned from your results and any recommendations for how you or others should proceed in the future to improve your program or the evaluation process. Make sure you neither under- nor over-emphasize the importance and magnitude of your findings; be realistic and take your results with a grain of salt.

2.5 Presenting Data in Tables

Tables are an excellent way to clarify and simplify data. Here are some tips for keeping tables easy to read:

- Always report the number of people that responded to your survey, the number of people that you sent the survey to, and the total number of people that attended your program.
- Simply reporting the numbers of people that selected a certain response to each question is an easy and effective way to convey your data to readers. Feel free to separate the percentages by demographic if it's important to your report (e.g., by faculty, year in school, etc.) [10].
- Keep in mind if you are reporting small numbers of respondents, you may not wish to publish any data that might reveal identifying information [10].
- Keep tables as simple as possible by grouping questions together wherever it makes sense, if it does not detrimentally alter the meaning of your data [10]. For example:

Instead of this:

How many binders do UCalgary students own?

None	30%
1	40%
2	20%
More than 3	10%

You can combine some groups into this:

How many binders do UCalgary students own?

None	30%
1	40%
2 or more	30%

- You can also collapse any numerical scale responses you have into categories like “high” and “low,” but make sure that you report which numbers are included in your categories [10]. For example:

Instead of this:

Responses to “On a scale of 1-5, how much did you enjoy this seminar?”

1	10%
2	20%
3	10%
4	30%
5	30%

You can collapse scales into this:

Responses to “On a scale of 1-5, how much did you enjoy this seminar?”

Low satisfaction (1-3)	40%
High satisfaction (4-5)	60%

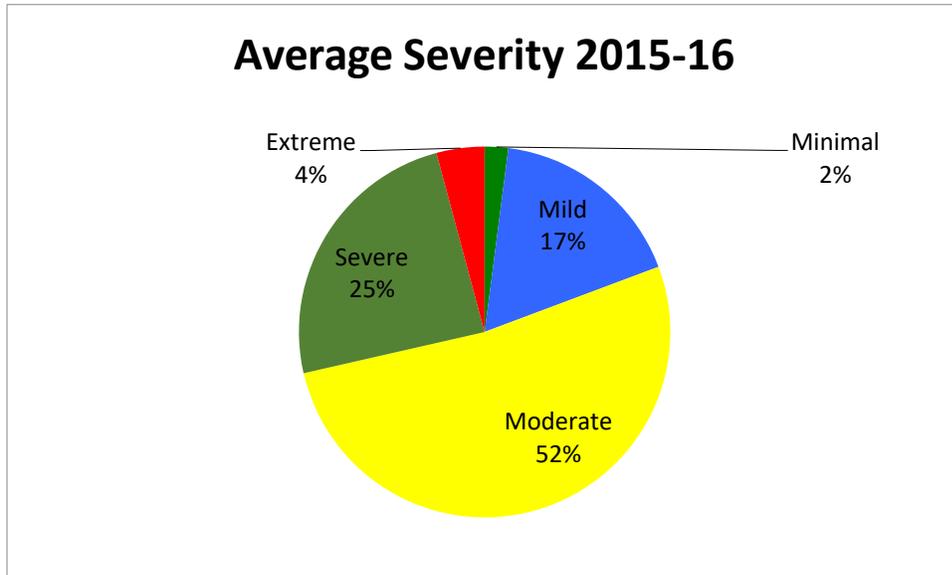
- Minimize the amount of numbers reported where it makes sense and doesn’t alter the meaning of your data [10]. You can also write out responses in prose: “Sixty percent of participants indicate that they liked the program, while 20% were unsure.”
- Make sure to give your tables clear, concise titles. Report the exact wording of the questions that you asked your participants [10].
- Remember to give some context to your numbers. Report how many people responded to your survey (i.e., how many people make up the percentages) and any other relevant contextual information. Report any time the percentage context changes (e.g., if you start reporting percentages of only those that responded “yes,” etc.) [10].
- Normally, the demographic information is reported first, along with any relevant comparison populations (e.g., compared to Calgary demographics, or UCalgary demographics). This is to show that your sample is representative of a wider population, if that is important to the claims you’re making [10].
- Consider reporting the reasoning behind how you drew your sample, how you analyzed your data, and why you worded questions the way you did.

2.6 Presenting Data in Charts

Charts are another fantastic way to communicate information in a clean, easy-to-digest fashion. There are different kinds of charts, which serve different purposes. See resource [11] for helpful tips on how to best use charts.

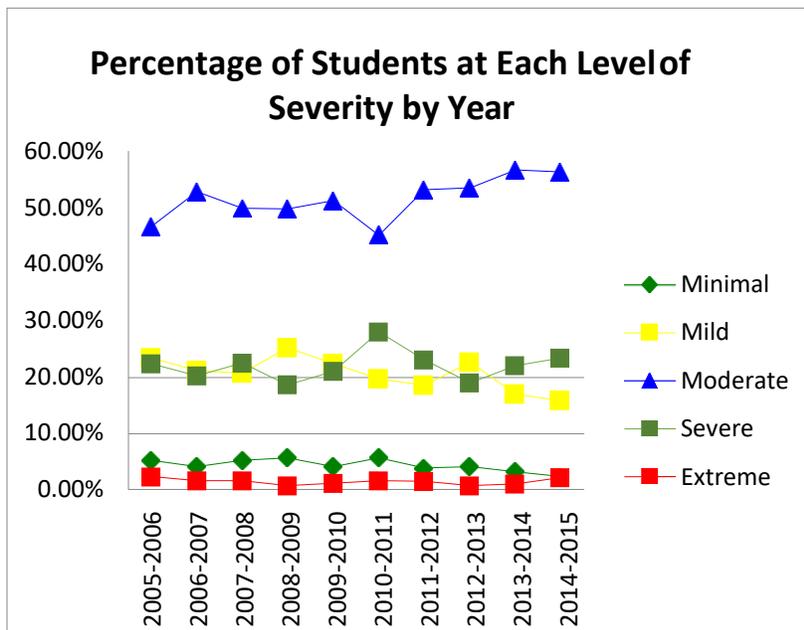
Pie Charts

Pie charts demonstrate the relation of parts to a whole [11]. Here is an example:



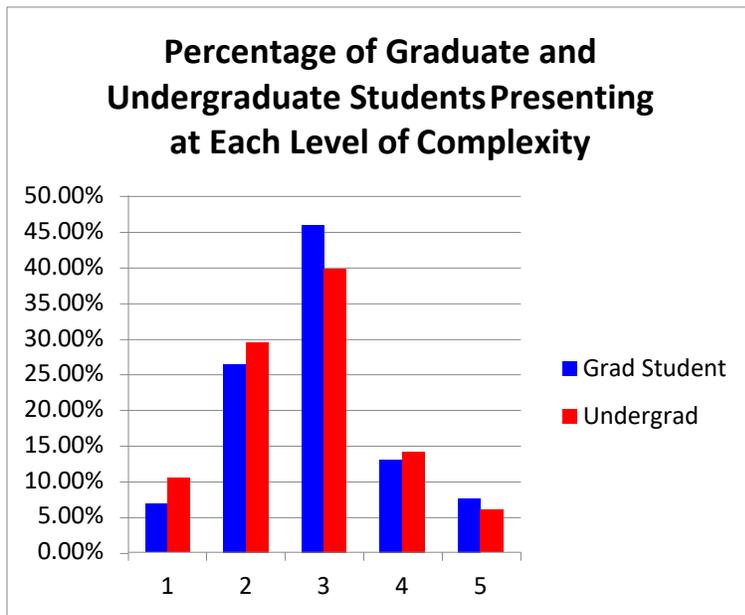
Line Chart

Line charts are helpful in demonstrating changes of measures over time [11]:



Bar Charts

Bar charts are useful for demonstrating comparisons [11]:



2.7 Resources for Reports and Presentations

Resources:

Title	Description	Format
Data + Design: A Simple Introduction to Preparing and Visualizing Information [12]	This e-book talks about many facets of evaluation including how to prepare an effective presentation or report.	Guide
Focusing Digital Dashboards for Use: Considering Design, Planning and Context [13]	This PowerPoint presentation aids in creating appealing visual representations of data.	Presentation
Using Graphics to Report Evaluation Results [11]	This PDF summarizes key ideas in making visual presentations of data appealing.	Guide
Social Math - Bringing Your Program Data to Life [14]	This PDF provides steps on how to make communicating your main messages accessible to stakeholders and others.	Presentation
Pie Chart in Excel [15]	This website shows you how to create pie charts in Excel.	Presentation and Guide
Present Your Data in a Scatter Chart or a Line Chart [16]	Go to the "Create a Line Chart" section to learn how to create line charts in Excel.	Guide
How to Create a Column Chart [17]	Bar charts are sometimes called "column charts." This website guides you on creating one from you data.	Guide
Basics of Good Evaluation Reporting [18]	A PDF with some quick tools and tips on good evaluation reporting.	Guide
Preparing an Evaluation Report [19]	A quick summary on preparing an evaluation report.	Guide

Evaluation Report Outline [20]	A brief overview of the contents of evaluation reports.	Guide
Writing an Evaluation Report [21]	This PDF talks about how to write each section of an evaluation report.	Guide

3. Improving Your Program

This section is at the core of program evaluation. Your program evaluation questions led you to your findings. What do you do now with what you have learned? In some ways, improving your program requires going back to the drawing board. It requires you to go back to your drawing board and ask: if we continue to program as is, will it give us the results that we are wishing to achieve? Another question worth asking is: did the way we implemented our program meet the needs of our stakeholders and participants? Feeding your findings back into such conversations is sure to give you space for reflection. What recommendations did participants suggest? Were your participation rates low? Were your findings non-significant? Did your staff spend too much time or resources implementing the program? Or, conversely, what went well? What should we continue to do? Who most benefited in our program? The resources below will help you ask good questions about improving your program, as well as offer suggestions on next steps.

Following this step, the program implementation and evaluation cycle repeats itself, year in, year out. This puts you in the driver's seat of your work, helping revise the program, if needed, and keeping parts of it that fit with your vision. Being empowered with skills in program evaluation will allow you to create specialized and tailored programs that are relevant in terms of their process and outcomes. And the more you cycle through these steps, the better you'll get at it!

Resources:

Title	Description	Format
Improve Program [22]	An indispensable guide to improving your program through program evaluation. Many examples provided.	Guide
Improve Program with Evaluation Findings [23]	This guide proves steps on how to use your evaluation findings to improve your program for future cycles.	Guide
Refining the Program or Intervention Based on Evaluation Research [24]	In this guide, you'll be asked concrete questions to help you proceed with this step, provided with best practice ideas, and given a checklist for how to proceed.	Guide

4. University of Calgary Brand Standards and Templates

See the resources below for information on University of Calgary brand standards and downloadable materials.

Resources:

Title	Description	Format
UCalgary Visual Identity Standards Basics [25]	This PDF talks about things like UCalgary colors, fonts, branding, page layouts, and much more.	Guide

UCalgary Brand Website [26]	Look through this site to find downloadable logos, templates, images, stationery, writing guides, advertising, etc.	Guide Templates Resources
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