Ready, Set . . . Evaluate Your Coalition

You Can Do It . . . CDC We Can Help!

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Evaluation Myths

Myth 1: Evaluation is complex - we don’t have the time!

Myth 2: It’s an event to get over with and then move on!

Myth 3: Evaluation involves a new set of activities – we don’t have resources!

Myth 4: There’s a "right" way to evaluate. What if we don’t get it right?

Myth 5: Funders will reject our evaluation plan!

Myth 6: We don't need evaluation to tell if our coalition & strategies are effective!
Part I

Get Ready
Help Members Value Evaluation

• Demystify evaluation - Integrate it into everyday work – recognize its multiple purposes

• View evaluation as reflection: How can it … improve our work? Influence stakeholders? Ensure funding?

• Share impact that other evaluations have had on funding decisions or public visibility
Challenges of Evaluation
Check it Out!

What has gone well with your evaluation efforts?

What challenges have you faced?
Evaluation Pitfalls

- Evaluation results may be used for purposes other than intended
- Evaluation becomes political vehicle to push through inappropriate agenda or conceal real problems
- Process of evaluating may upset fragile relationships
- Powerful players try to influence evaluation outcomes; all players not included or heard
- Evaluation results are ignored

» Taylor-Powell, Rossing & Geran, 1998
Are You Ready to Evaluate?

- Are you committed to evaluate coalition & its work?
- Are coalition’s goals realistic?
- Are strategies consistent with coalition’s goals?
- Are desired results specific & clear enough?
- Are strategies well-grounded in theory/evidence?
- Do you know what kinds of data will be needed?
- Is data available? Can you access it?
- Will evaluation be used to make coalition/policy decisions?
Are You Ready to Evaluate?

- Will findings help you decide whether to expand strategies to new populations/settings?

- Are adequate resources available?

- Will evaluation...address key questions? ... provide “lessons learned”?

- Will you heed evaluation results, even if they cause your coalition to change?

- Is evaluator/team willing to listen to coalition about how to design evaluation & interpret/report findings?
The 4 “Ws” of Coalition Evaluation
Why Should We Evaluate?

1. Builds capacity within organization & community
   Do partners use approaches or tools for other issues?

2. Determines whether objectives are achieved
   Did organization achieve goals?

3. Improves strategies interventions, practices & policies
   Were strategies effective?

4. Provides accountability to stakeholders & funders
   Are staff/members satisfied & contributing? Were resources used well?

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When Should We Evaluate?

- Change in resources
- Change in membership, leadership or staff
- Change in structure
- Expand topics, population, geographic focus
- Major conflict or issue
- External recognition
- Begin new project or hold important event
- Before marketing or fund-raising initiative
Who Should Evaluate?

- Evaluation team (Tap experts, staff or coalition members to help coordinate evaluation efforts)
- In-house evaluator, but coalition makes decisions & controls process
- External consultant plans/collects data & engages coalition as appropriate
- External evaluation by funder
What will it Cost?

• Usually 7-10% of program budget
  – Salary & benefits: Staff time & level of expertise needed
  – Consultants: Special expertise & different perspectives
  – Travel: Variable; depends on program & methods
  – Communications: Postage & phone/fax
  – Printing: Preparation of data-collection instruments, reports, & other documents
  – Supplies & equipment: Computers & software
  – Incentive items: Meals & gift cards
What Should We Evaluate?

Questions:

• What about coalition works/doesn’t work well? How can we make it work better?

• Who are key members? Are we meeting their needs? Are we building their capacity?

• What resources have been most helpful or are needed? What are associated costs?

• Do strategies fit coalition’s mission & goals?

• Are strategies successful? Reaching intended groups?

• What have we accomplished?
Logic Models

• Help describe core components of coalition

• Shows connection between coalition, strategies & expected outcomes

• Helps evaluators select appropriate measures

• Includes key contextual factors
<table>
<thead>
<tr>
<th>Inputs/Resources</th>
<th>Strategies/Activities</th>
<th>Outputs</th>
<th>Short-term Outcomes</th>
<th>Intermediate Outcomes</th>
<th>Long-Term Outcomes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Available resources, fiscal &amp; human</td>
<td>Actions to be taken; action plan</td>
<td>Tangible results or products of activities</td>
<td>Changes in learning, knowledge, skills</td>
<td>Changes in behavior or practice</td>
<td>Changes in systems, conditions or environments</td>
</tr>
</tbody>
</table>

Logic Model Shows...

How your efforts... lead to change.
Components of a Basic Logic Model

**INPUTS**
Investments or resources (e.g., time, staff, volunteers, money, materials)

**INFLUENTIAL FACTORS**
Surrounding environments in which the program exists (e.g., politics, other initiatives, socioeconomic factors, staff turnover, social norms and conditions, program history, stage of development) that can affect its success either positively or negatively

**ACTIVITIES**
Events or actions (e.g., workshops, curriculum development, training, social marketing, special events, advocacy)

**OUTPUTS**
Direct products of program (e.g., number of people reached or sessions held)

**INITIAL OUTCOMES**
Short-term effects of program (e.g., knowledge, attitude, skill, and awareness changes)

**INTERMEDIATE OUTCOMES**
Medium-term results (e.g., behavior, normative, or policy changes)

**LONG-TERM OUTCOMES**
Ultimate impact (e.g., social or environmental change)

**GOAL**
Mission or purpose of program
Check it Out!

What do you want to know about …

- How your coalition functions?
- Its partners?
- Its outcomes?
PART III  EVALUATE!
# Sources of Data

**Existing Data**
- ✔ Coalition Documents (Reports, newsletters, minutes, rosters)
- ✔ Existing databases
- ✔ Business records or websites

**People**
- ✔ Coalition members
- ✔ Participants or participants
- ✔ General public
- ✔ Key informants (funders, officials)

**Other**
- ✔ Actual events, activities, practices
- ✔ Before/after pictures (photovoice)
- ✔ Maps, charts
Check it Out!

What methods have you used to ...

- evaluate coalition effectiveness?
- evaluate its strategies?
- evaluate its outcomes?
A Dozen Data Collection Methods

1. **Survey** - mailed, electronic, in-person, phone
2. **Interviews** - in-person, phone, focus group
3. **Group Assessment** - forum, Delphi technique, Nominal Group Process
4. **Observation** - use trained interviewers
5. **Case Study** - multiple data sources & methods
6. **Formal Review** - by peers, panel, experts, review committee
7. **Portfolio Review** - work samples to rate quality & scope
8. **Document Review** - content analysis to assess & summarize
9. **Testimonials** - responses/reactions by key participants
10. **Tests** - standard measures of knowledge, skill, performance, physiology
11. **Photographs/videos** - visual images & stories
12. **Diaries/Journals/Logs** - chronological records; personal views
Selecting Methods

- What data is needed to make decisions about product, program or organization?
- How much data can be collected & analyzed practically?
- How accurate is data?
- What methods will be used if more data is needed?
- Will results be credible to decision makers?
- Are methods acceptable (Will respondents engage in surveys, interviews & focus groups? Allow record access)?
- Who has skills to use methods? Is training required?
- How will data be analyzed?
Instruments & Tools

- Coalition Effectiveness Inventory (CEI)
- Meeting Effectiveness Inventory (MEI)
- Teamwork surveys
- Collaboration & Inclusivity Checklists
- Member Satisfaction Surveys
- Member & Leader Interviews
Free/Low Cost Evaluation Tools

- Survey Monkey: $200./yr [www.surveymonkey.com](http://www.surveymonkey.com)
- Online Evaluation Resource Library: Create surveys, interviews, observation guides: [www.oerl.sri.com](http://www.oerl.sri.com)
- United Way Outcome Measurement Resource Network: Downloadable or low cost (< $50. tools & instruction) [http://national.unitedway.org/outcomes/resources/](http://national.unitedway.org/outcomes/resources/)
• **LEVEL 1**: Coalition infrastructure, process or function

• **LEVEL 2**: Coalition interventions

• **LEVEL 3**: Health/social status or community change (environment, policies & practices)
Short-term Evaluation

- Immediate results of coalition work
- Measured more frequently – monthly or quarterly
- May be influenced in 12-18 months
- May focus on changes in:
  - Coalition (budget, recruitment, meetings)
  - Strategies (context, reach, doses delivered/received)
Outcomes are more than just numbers!

- **Membership**: Increased # of members, not as important as what sectors they represent & how they contribute to coalition (e.g., taking leader role, being active in WGs)

- **Attendance**: # of members attending meetings not as meaningful as whether attendance is consistent (i.e., core of members who regularly attend)

- **Strategies**: # of people reached by activities/strategies not as important as whether they represent priority or intended population & whether strategies were of sufficient intensity to cause change
Intermediate evaluation

- Intermediate results of coalition work
- Influenced by multiple short-term outcomes
- Measured semi-annually or annually
- May be influenced in 2-3 years
- May focus on changes in:
  - Strategies
  - Knowledge, attitudes, behaviors/practices
  - Policy, systems & environment
Long-term evaluation

- Long-term results of coalition work
- Influenced by multiple intermediate outcomes
- Measured annually
- May be influenced in 3-5 years
- May focus on changes in:
  - Policy, systems & environment
  - Health/social status
  - Statewide capacity/institutionalization
Check it Out!

What short, intermediate & long-term outcomes have you measured?
Level 1. Coalition infrastructure, function & process outcomes

Member representation  Expectations
Skills/experience        Perceived effectiveness
Recruitment             Leadership
Participation            Costs/benefits
Role clarity             Organizational structure
Commitment               Planning products/quality
Satisfaction             Sense of ownership
Decision making          Conflict
Organizational culture   Communication
Resources

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Sample Short-term Outcome Measures

- # of coalition meetings in past year
- # members from priority population attending training
- # of staff members certified in communication or media training
- Level of satisfaction of coalition members
- # hours contributed by volunteers
Level 2. Coalition Intervention Outcomes

- Implementation
- Media coverage
- New/modified services & strategies
- Statewide actions taken
- New/modified policies & practices
Sample Intermediate Outcome Measures

- Increased knowledge about addiction
- Improved cultural awareness of priority population
- Increased self-efficacy about tobacco cessation
- Improved skill in advocacy
- Improved behaviors (e.g., attending AA classes)
- New policy - point of purchase tobacco sales
- New clinic referral practice
- Increased treatment options
Level 3. Health status & systems change outcomes

Community capacity & competence

Organizational viability

Health status

Availability, access & use of services
Sample Long-term Outcome Measures

• Sister coalition formed in adjacent community
• Long-term funding obtained by coalition
• Institutionalization of coalition intervention existing agency
• Decreased rates of substance use, decreased initiation of smoking by teens, decreased DUI rates
Interpreting & Using Results
Interpreting & Using Results

- Evaluation team should summarize data & present to key partners/stakeholders for feedback/interpretation.
- Re-circulate draft report to ensure that conciseness, clarity & outstanding issues have been addressed.
- Final report can then be disseminated widely.
- Entire coalition should develop action plan that sets responsibilities for acting on findings.
Disseminating Results

- Coalition & partner newsletter/website articles, press conference & media release
- Data summaries to legislators & foundations that might be interested in coalition effort
- Social event (breakfast, reception) to thank staff, members, supporters & funders
- Written notes to key stakeholders that highlight successes & thanks them for contributions
Free/Low Cost Evaluation Manuals & Websites

- Community Toolbox:  [http://www.ctb.edu](http://www.ctb.edu)

- *Empowerment Evaluation Website:*
  [http://www.stanford.edu/empowermentevaluation](http://www.stanford.edu/empowermentevaluation)


- Coalitions Work. [http://coalitionswork.com](http://coalitionswork.com)
Parting Tips

• Your questions about coalition & interventions should drive evaluation – not the other way around

• Enlist partners’ help - builds buy-in & cooperation

• Start small – plan 1 or 2 evaluation activities/year

• Take advantage of data you already have

• Verify partner roster to maximize response rates

• Reduce respondent burden – short, frequent surveys

• Use & adapt existing tools
So, take your mark & start evaluating!


• Community Toolbox: http://www.ctb.edu