How to Prepare for an Evaluation

THE FOUR QUESTIONS

A successful evaluation effort depends on strong grantseeker-grantmaker alignment. When both parties see value in the data being collected and can learn from it, the likelihood increases that an evaluation's findings will be actionable.

This toolkit provides a framework for arriving at stronger alignment between stakeholder interests for program evaluation. By answering a series of four key questions that drive almost any evaluation effort, grantmaker and grantseeker partners can break down complicated conversations into specific desires that clearly demonstrate where consensus exists—upon which they can build a mutually satisfying measurement and evaluation effort.

In a world where resources for evaluation and learning are often scarce, gaining clarity from the beginning, in partnership, about what's going to happen, how it's going to happen, and how the resulting products will be used is essential and sets up the evaluation for success. From our experience working at the nexus of the grantmaker and grantseeker relationship, we have seen that this preparation ensures a more meaningful and positive process and experience for all.

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THE FOUR QUESTIONS

Who are the audiences for the evaluation/ learning?

What do they need or want to learn?

How will they use the information?

What represents valid, credible, reliable data?

Question 1: Who are the audiences for the evaluation/learning?

This question is the foundation or cornerstone for subsequent questions in the planning process. The other three questions in this four-step process will all reference back to each "audience" identified in this step. Different audiences will have different sensitivities and sensibilities.

The grantmaker and grantseeker themselves are relevant audiences, but both parties likely have multiple audiences who will be interested in the evaluation findings. Each audience may have different needs for information, and certain information may not be appropriate for all audiences.

Imagine that the evaluation is complete. Who would you want to send it to/share it with/read it/make sure they see it/gather feedback from about it? Who might potentially use the data beyond the grantmaker and grantseeker? Who would you *hope* would use it?

For each question, we have explained **why** the question is important and provided a list of **possible answers**. The answers to the questions should reflect your program and its stakeholders; we are merely providing some examples here.

Possible Answers

- Program participants and beneficiaries
- Board
- Other grantees/grantseekers
- Media
- Other nonprofits
- Program/nonprofit staff
- Grantmaking staff
- Potential grantmakers

Question 2: What do they need or want to learn?

Often, when thinking about an evaluation, organizations will say "let's survey participants" or "we should probably interview stakeholders"—without knowing exactly what they want to learn from these activities. To plan successfully for an evaluation, specific methods need to be secondary to the core learning questions. Once the key audiences have been identified, it's time to consider the main content of the evaluation. What does each audience want to learn about participants, alumni, non-participants? Do they want to learn about how or how well the program or initiative was implemented? Do they want to understand what happened for participants as a result of their participation?

In our work helping organizations define their learning questions, we have found that often there needs to be some conceptual work to unpack and understand terms and language used in these questions. For example, if a program is meant to help young people strengthen their Jewish identity, there should be a conversation around "what does Jewish identity mean?" for program participants. Possible answers to this question could include connection to Israel, love of volunteerism and social justice, engagement in Jewish life, and/or enhanced Jewish values.

Take the time to clarify your terminology and get as specific as possible, to help ensure that your audiences actually learn what they are hoping to learn.

Possible Answers

Implementation Focused

- Is the program reaching its intended audience? If not, what changes must be made to do so?
- What strategies have been successful in encouraging participation?
- Is the program achieving its desired outputs?
- Which aspects of the program implementation process have facilitated or hindered program goals?
- How do the different program components interact and fit together to form a coherent whole?
- Which components are most important to program success?

Outcomes Focused

- What impact does the program have on participants, their families, the institution, the larger community?
- Were the intended outcomes for program participants achieved? Why or why not?
- What unintended outcomes resulted from this program and why?

Question 3: How will they use the information once they have it?

A trusting relationship between grantmaker and grantseeker greatly facilitates an evaluation.

One key to building trust is transparency. Everyone involved in planning and executing an evaluation needs to understand what is at stake. Different constituencies will certainly have different opinions about how they want to use the information learned from the evaluation. Grantmakers may want to use the results of the evaluation to make a funding decision—whether to continue, scale back, or increase funding—or to help recruit other grantmakers to the program. Grantseekers may want to use the learnings for marketing or media purposes; they will also likely be focused on future program improvements.

Thinking about this question will naturally be driven by the evaluation's audiences (Q1) as well as the kinds of questions to be explored (Q2). While this toolkit is built on a sequential set of questions, answering these questions should be an **interconnected process.**

The desires of grantmakers and grantseekers will help to shape the evaluation, so it's essential to be clear—and especially transparent—to ensure high utility of evaluation learnings. In this way, it is important that grantmakers and grantseekers not hide behind an evaluation effort to support a decision they have already made or are prepared to make as part of the program. Generally speaking, grantmakers and grantseekers are committed to the same goals. Neither party can do its work without the other.

Go into the effort with openness to the possibility of difficult findings. Discuss the implications for each party. What are the stakes in this evaluation for you? What happens for your organization?

For more on how to discuss challenging findings and data with stakeholders, see our publication "**Soft Skills for Hard Data**" at rosov.co/softskills.

Possible Answers

- Drive program changes
- Assess whether to continue program/funding
- Mid-course corrections
- Discontinue or increase funding
- Marketing purposes
- Further development/fundraising

Question 4: What represents valid, credible, reliable data?

Everyone has their own opinion about what constitutes "data." For some, testimonials and stories can be really meaningful and powerful, serving as "qualitative" data. Others may want "hard" facts or numbers, which are usually "quantitative" data. Even more important, though, is understanding what kinds of data gathering will be possible for the program and who are the appropriate sources of data. Answering these questions will help ensure that data gathered are valid, credible, and reliable for program stakeholders. For example, if there are only 25 people in a program, relying on quantitative survey data probably won't be very helpful, but interviews or focus groups could provide in-depth and useful feedback.

At the same time, this question is important because you don't want learnings from the evaluation to be dismissed by your audiences on a "technicality" or because you didn't include certain groups of people who may be essential to the program.

Take time to think about what is important to you—and for whom.

Possible Answers

- Numbers
- Improvement metrics
- Stories
- Comparative data
- Longitudinal data
- Third-party data (collected by an external evaluator)

INSTRUCTIONS FOR SHARED GRANTMAKER/GRANTSEEKER REFLECTION

Before the evaluation, grantmakers and grantseekers should look at the four questions in this toolkit and take time separately with their staff or key stakeholders to answer them (using the provided worksheet pages or online Miro board template, if desired; see sample worksheet pages for a real-life example of using this framework).

After the questions have been answered, the grantmaker and grantseeker should then meet to compare and contrast responses. This meeting can be supported or facilitated by an evaluator if desired.

This step is critical! This conversation between key stakeholders is in and of itself a moment for learning and growth.

Questions for Consideration

1. Are there areas of shared interest that could be leveraged in an evaluation design? What are they? These will likely be the most productive areas to focus on for the evaluation.
2. Are there any competing questions or disagreements that could create tension in an evaluation process (e.g., grantmaker is interested in number of participants or "touchpoints" and grantee is not)? How can common ground be found?
3. What are the implications of difficult findings for both parties? How might the grantmaker respond to difficult findings? What are the stakes in such a scenario for the grantseeker?
4. Are there important inflection points where shared data would be valuable? How does this drive and relate to evaluation timelines (e.g., board reports for grantees, annual board meeting/grant cycle for grantmaker)?
5. What kind of communication process will there be for the evaluation? How hands-on does the grantmaker want to be?

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ORGANIZATION NAME: The Jewish Foundation of Cincinnati (funders of the Cincinnati Jewish Teen Initiative)

1 Who are the audiences for the evaluation/learning?	2 What do they need/want to learn?	3 How will they use the information?	4 What represents valid, credible, reliable data?
The Jewish Foundation of Cincinnati Trustees and staff	Does the Cincinnati Jewish Teen Initiative (CJTI) lead to expansion of available offerings for Cincinnati Jewish teens? Does CJTI bring "new" teens into the fold of the organized Jewish community?	They will make funding decisions (e.g., renewal, scale up, scale down) They may make decisions about tweaking or expanding the Initiative	Numbers of participating teens Numbers of teens who are "new" to the community Evidence (quantitative and qualitative) of Jewish growth (stronger personal Jew-*ish* identity) for teens
Cincinnati Jewish teen engagers and educators	What "works best" for engaging Jewish teens? What do teens want? What pushes them away from participating in Jewish programs?	They will share their personal wisdom in response to evaluation data; replicate successful models and learn from mistakes	Attendance records Success stories (from teens and *ish* staff)
The field of Jewish teen engagement (professionals and funders) nationally	How successful is the particular ish intervention in attracting "peripheral" teens into greater participation? How impactful are *ish* programs in terms of teens' Jewish identity and interest in future involvement (in some way)?	Partner with TJF to support CJTI Replicate the *ish* approach in their local communities	Quantitative data regarding number of participating teens who are not "known" to the community Quantitative and qualitative data regarding teens' Jewish identity and future involvement

ORGANIZATION NAME: *ish* (operators of the Cincinnati Jewish Teen Initiative)

❶ Who are the audiences for the evaluation/learning?	❷ What do they need/want to learn?	❸ How will they use the information?	❹ What represents valid, credible, reliable data?
The Jewish Foundation of Cincinnati and Jim Joseph Foundation as the key funding partners	How many teens who are new to the "universe" of the Cincinnati organized Jewish community (i.e., are on lists of Jewish organizations and participate at least sometime) are attracted by CJTI programming? How likely are they to continue to participate in CJTI? How likely are they to continue to participate in other Jewish programming?	They will make funding decisions (e.g., renewal, scale up, scale down)	Numbers of individual teens Direct feedback from teens (surveys and interviews)
Cincinnati Jewish teens (primarily those more engaged and those who take on CJTI leadership roles) and their parents	What events and programs are available to teens? What makes events and programs attractive? What makes them successful (in terms of attendance; likelihood to return; reaching an inclusive group of peers; feeling supported as human beings and as Jews)? Who (demographics) participated in the program/ experience?	They will advocate for and help co-design more/new programs, encourage peers to participate; participate themselves Systematically reflect on their practice within a collaborative context to identify needs and actions to address needs Use data to generate a relational learning community (a collaborative and reflective learning space)	First-person accounts from peers (program participants) Survey and interview data Participant-generated/owned data using action research and design thinking methods (e.g., Group Level Assessment, Empathy Interviews, Future Creating Workshop)
Cincinnati Jewish Teen Engagement & Education agencies/organizations/ partners	What programs/models have been successful in the past? What trends/programs/models should be reworked, reframed, or abandoned altogether? How to work with teens to co-design/co-create programs/ experiences? How to support a sustainable teen-driven/teen-centered engagement & education system/model?	Work and learn from/with teens to understand challenges & opportunities within their programs Prototype & test new teen-driven/teen-centered programs Collaborate with other organizations to prototype/test partnerships Use data to generate a relational learning community where organizations can systematically reflect on their practice within a collaborative context to identify needs and actions to address needs	First-person accounts from peers (program participants) Surveys and interviews Participant-generated/owned data using action research and design thinking methods (e.g., Group Level Assessment, Empathy Interviews, Future Creating Workshop)

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ish staff	Who are the teens that we are reaching (demographics; geographic)? Are we pulling teens into our orbit that were not on our lists? What are teens looking for? What do they find appealing? What pushes them away from Jewish programming? What kinds of teens are not being reached by currently available Jewish programs ("gap groups")? Whose voices are not being represented? What strategies work best to empower teens (work directly with/support teens) to co-design and co-create programs to reach new and/or growing numbers of teen peers?	They will design/co-design (with Cincinnati youth professionals and teens) new/more teen events and programs that capitalize on what works and avoid things that push teens away Learn, disrupt, and create change (not to stay safe; "if you're not growing, you're regressing to safety") Share data & teen-engagement model with partners to drive more/improved program experience ecosystem-wide	Teen voices (qualitative and in-person; as well as from surveys) Numbers of teens participating (first time and returning)
Jewish funders nationally and regionally	What are emerging trends and data points around engaging Jewish teens? What new models for engaging Jewish teens are "making waves"? (May be relevant to "Jew-*ish*" settings as well as to non-Jewish settings) What can they learn from *ish*/Cincinnati community? What models/methods may be translatable to other communities?	Partner with and support CJTI Support similar programs in their local communities Create connections between *ish*/Cincinnati orgs and other cities for mentorship/learning exchange	Quantitative and qualitative data regarding teen participation, Jewish identity growth, and interest in future involvement

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