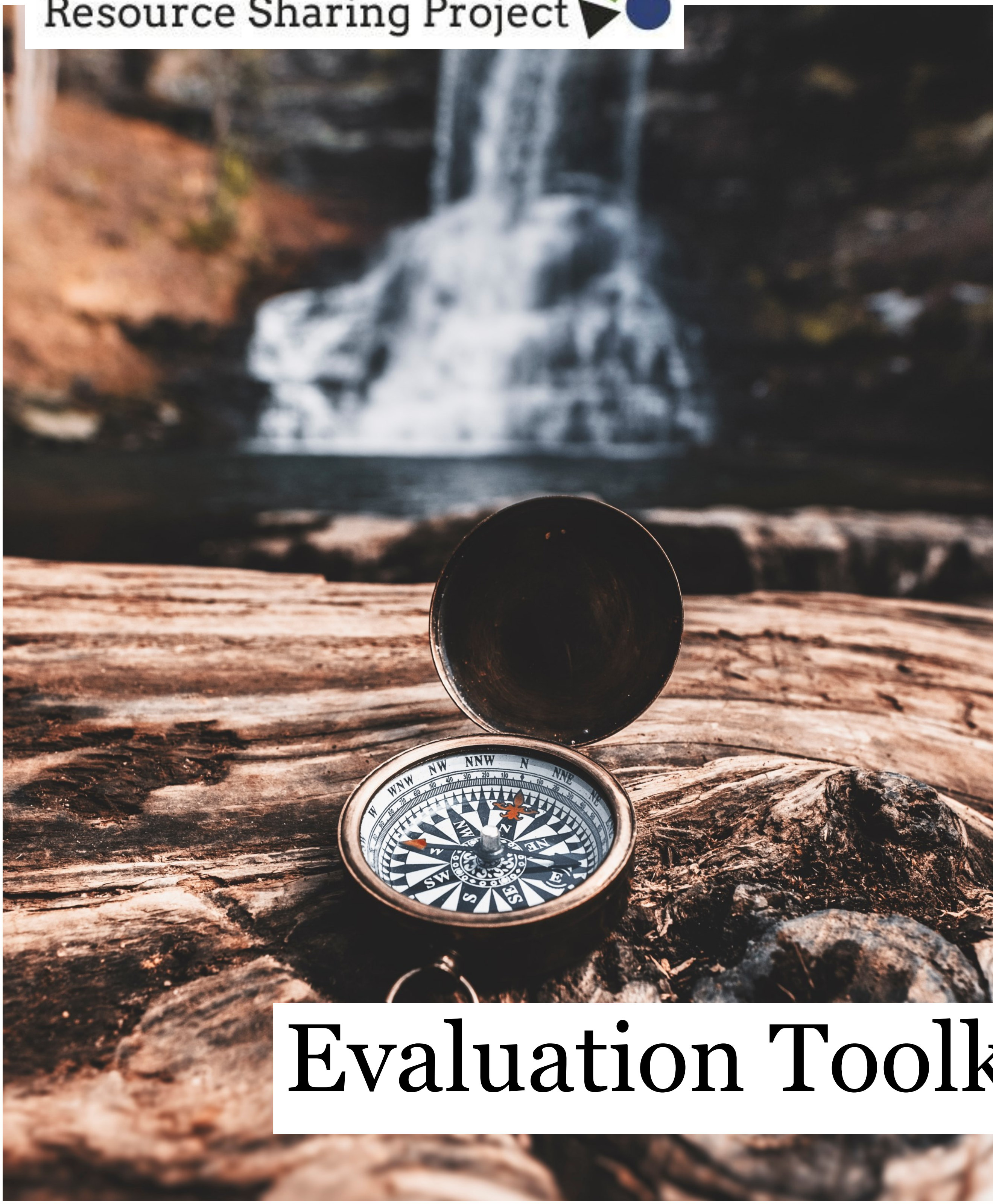
NATIONAL SEXUAL ASSAULT COALITION
Resource Sharing Project



Evaluation Toolkit

MODULE FOUR

Tools For Evaluating TA

Resource Sharing Project

Evaluation Toolkit

Module Four: Tools for Evaluating TA

Written by: Laura Pinsoneault, Spark Policy Institute, and
members of the Resource Sharing Project Staff

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INTRODUCTION

Module 3 helped us plan for a TA evaluation to understand our impact and learn from how we provide TA. Now, it is time to choose tools and approaches for gathering different perspectives on our evaluation questions. (Module 5 will suggest some tools for turning this data into meaningful information.)

We are largely familiar with evaluation tools such as structured surveys and interviews that have been set up to reflect the interests and perspectives of those doing the evaluation. However, at times, structured surveys and interviews leave us feeling that our perspectives and experiences are not worthwhile, that our cultures and beliefs are not respected or are being put down and that the tools themselves are designed to further oppress those who do not hold power and privilege. However, there are ways to adapt and design these tools to shift this experience.

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OVERVIEW OF DATA COLLECTION TOOLS & TYPES OF EVALUATION

What tool we choose depends on what it is we want to know and what opportunities exist to gather this information with individuals or groups who can best inform us with their perspective.

Before we look at specific tools, let us think about the different ways to gather information.

Ways to Gather Data

There are non-facilitated ways to collect data. These tools are structured to get at preset specific information and then given to others to provide responses to those questions. There is minimal interaction between those administering the evaluation and those responding to it. Non-facilitated data collection tools can be made inclusive when they are developed through a shared design process with the individuals whose perspectives we are trying to collect and/or when we engage others in helping understand what the data means after it is collected.

Facilitated tools are adapted in real-time based on reciprocal interactions between the person or persons facilitating the evaluation and the person or persons informing the evaluation. Not only are these tools adapted in real-time but making sense of the information often happens in real-time together as well. Facilitated tools help avoid a scenario where the person evaluating has more power over how information gets collected and understood than the person providing the perspective we seek.

In our work, we work against exclusion and oppression; therefore, it is critical that we uphold our values when using facilitated or non-facilitated tools. Whenever we use one of these tools in our evaluation practice, it should be the starting point for questions like:

- What more do we need to know
- Whose perspective is missing
- Where are the points of disagreements and what does that mean for how this TA needs to look going forward

If one of these tools we are using is consistently telling us the same thing, we should consider (1) the tool is not asking the right questions, (2) we may need a different tool or a different type of evaluation to get at meaningful information, or (3) we evaluated this TA enough.

Non-Facilitated Tools

This toolkit only covers briefly the use of structured, non-facilitated tools. These can be great tools to collect a variety of different information and can be designed in ways that are culturally affirming. Non-facilitated tools are often considered more mainstream, and thus, carry the potential to reinforce power dynamics between the people doing the evaluation on those perspectives we are trying to get. We suggest that when designing these tools, they be co-created or selected with the groups or individuals we hope to inform the evaluation. This practice can help generate stronger and more useful information and ensure they are used in culturally affirming ways.

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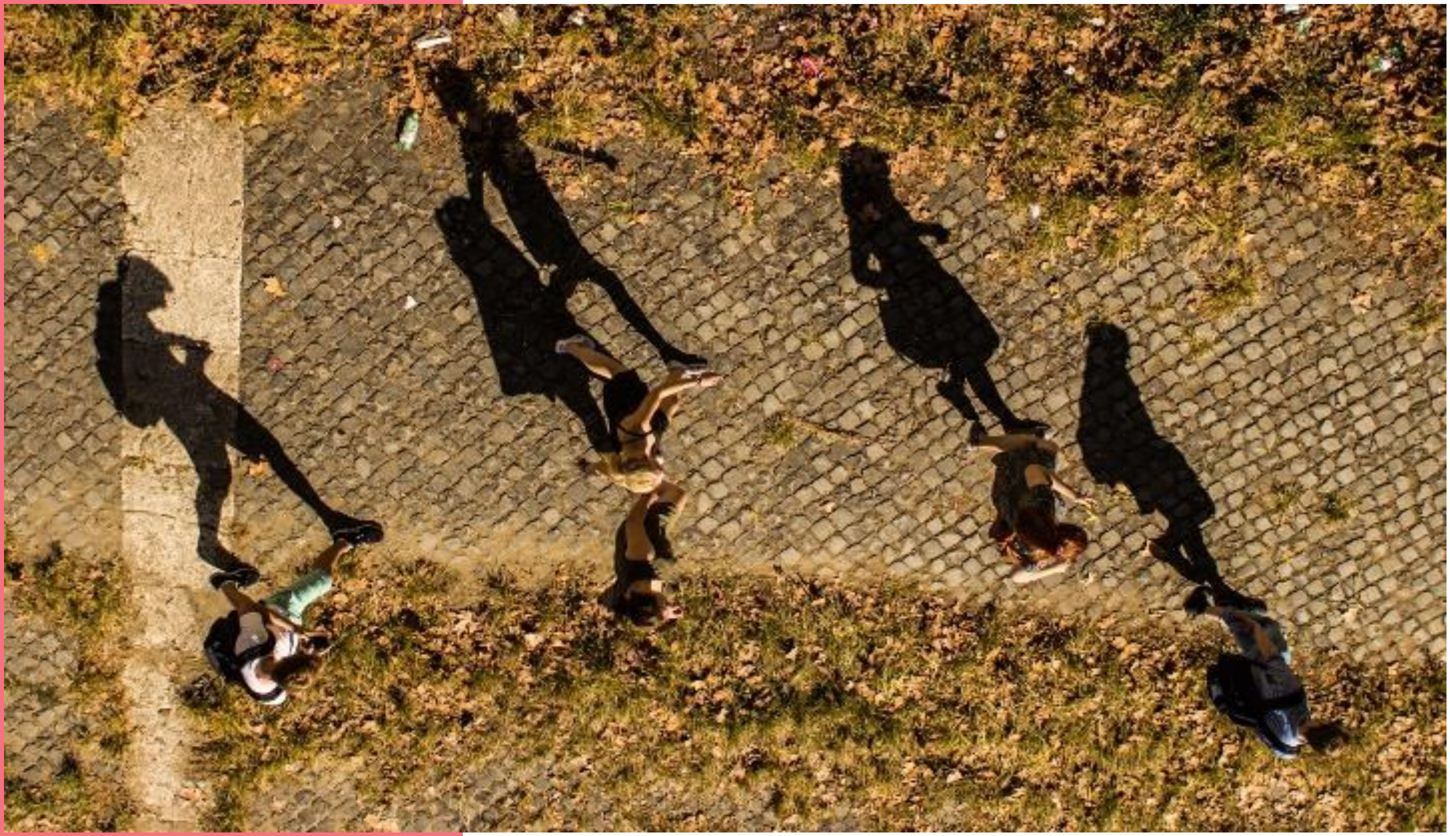
Surveys

Surveys are a good tool for collecting information quickly, especially from a larger group of people (e.g. over 20) that would be hard to interview, or when we need to collect the same information across individuals. In our work, surveys are a good tool to evaluate TA delivery after events, to look at change in perspectives before and after the TA, to gather feedback about the quality or satisfaction with the TA or TA provider, and to regularly gather general information about TA needs.

Interviews

Structured interviews can help develop trust, build relationships, and gather specific information through a set of questions we want to ask in the same way across individuals. Interviews go deep and explore not just what happened, but how it happened. The depth of information provided by interviews makes it a good tool for intensive TA or TA provided to multiple people with differing needs and perspectives. Interviews can be structured or non-structured. Non-structured interviews can be more facilitative than structured, but structured interviews allow for stronger comparison across perspectives. If we are doing multiple interviews, some type of guided protocol is preferred.



Observation

Structured observation tools provide a structured way to document what you observe (e.g. actions, behaviors, context elements and practices) as a provider or user of TA. An individual not involved directly in the TA can also use these tools to inform the evaluation. A structured observation tool can be set up before TA is delivered around some key aspects of the TA that must be observed to answer the evaluation question and leave room for the unexpected. Observation notes get interpreted through the perspective of the observer not the participant but can later be used in a facilitated way to help better understand how what was seen and heard may be interpreted differently.

Facilitated Tools

This toolkit focuses primarily on facilitated tools. Here we focus most on tools that fall within the category of Narrative or Storytelling to help understand individual perspectives about our TA and its immediate impact. In Module 6, we focus on more on tools to help us learn about our TA design, its impact on systems, and how we can improve it.

> *This toolkit focuses primarily on facilitated tools*

Focus Groups

Focus groups are a facilitated discussion with a small number of people (about 6-10) to explore deeply a few key topics (no more than 3). If you have more than 10 people you would like to use a focus group setting for, it is ideal to conduct more than one. Focus groups are also a good follow-up to a survey to help explore some themes coming out of that analysis, to explore future TA needs and to understand how TA was experienced from multiple viewpoints at the same time. Focus groups are different than interviews because they use group thinking to inspire and stimulate deeper reflection by individuals. Focus groups can also facilitate networking and relationship building.

Wilder Research Library developed a tip sheet for doing focus groups through trauma-informed practice.

Narrative

"Narrative" is an umbrella term for tools that use written, spoken or visual representations created or co-created by people around a specific topic, question or idea. We often feel the power of narratives or stories when we are trying to build a movement and bring people together. This makes them powerful evaluation tools because they often contain what it is we need to know about what influenced this person's perspective and what it meant to them.

Narrative approaches are a great evaluation tool for us because of our values of inclusion. They offer people another, sometimes more natural way, to share their opinions and feedback. There is a lot of flexibility in narrative approaches, however, there are also a few things to consider before using a narrative approach.

First, gathering stories, in any form, is a huge responsibility. We may want to use storytelling tools as part of our TA because it feels more aligned with our values, but when it comes to sharing of stories, extra care needs to be taken with how we use stories. Our process for collecting stories and getting permissions needs to be survivor-centered, trauma-informed and acknowledge the power dynamics that may exist between storyteller, story collector and user of the story. Confidentiality is hard to maintain when it comes to storytelling. This is critical when we choose to collect stories in a group. Group narratives can be more powerful than individual stories, but we also need to be sure we have created a space where people are comfortable in sharing their story with others and comfortable in their right to say "no" without judgement and that the group has established norms about how and what information can be shared.

Secondly, we need to be strategic in our choice of stories. The sharing of stories can heal and inform us about what is meaningful and important about our support, but they may be too personal to be shared widely. Additionally, stories can be taken out of context or used by others to reinforce bias. Keep in mind everyone's story should be heard but not every story needs to be told.

Marshall Ganz, a civil rights activist, is well-known for creating tools for coaching and telling of stories. He and his team developed a [Public Narrative Participant Guide] to help build out this skill set. We provide several other storytelling resources in Module 7.

A DEEPER DIVE INTO TOOLS FOR OUR TA

Tools are directly related to the types of question we want to ask. We have organized the tools in this toolkit around:

- Reach
- Results
- Learning Environment and Relationships

Refer to Module 3 for more on the types of evaluations that fit best with the types of TA we offer.

Tools for Evaluating Reach

Evaluating the reach of our TA helps us understand *when*, *where*, and *to whom* our TA is being delivered, and certain points about its *quality*. This information is gathered on a regular basis to help make decisions about where to put our TA resources and energy and to help us meet the needs of our partners in a manner true to our values. This information also points out trends and patterns across our partners so that we can better tailor support.

Monitoring and tracking tools are the most commonly used tools in evaluation. Tracking and logging data is primarily quantitative (i.e. counting things) and is often used internally but not shared in raw form externally. Considerations for these tools focus on ease and accessibility for staff and deciding who has access to the information with attention to privacy and confidentiality. Consistency in how we define the data we are collecting is important when using monitoring and tracking tools.

The types of data collected to evaluate reach include:

- Information about the program receiving TA
- Who at the program received the TA
- What sector the program represents (e.g. non-profit, community organization, individual, etc.)
- Information about who delivered the TA
- Who in the coalition delivered the TA
- How were they connected to the program that needed the TA
- How the TA was delivered. Phone call? Training? 1-1 engagement?
- How long the TA took
- What was the quality or satisfaction with the TA

The Violence Against Women Act Measuring Effectiveness Initiative offers some good resources and databases for this type of reporting.

TA Planning or Record Forms

The baseline for quality TA is whether we met the expectations and needs of programs. Regardless of what type of TA we are providing (reactive, proactive or intensive), we need to ask the right questions up front. The best way to support TA evaluation is to have a standardized form that collects critical information we need to best implement TA and track its implementation. This form can have space for the provider of TA and the program to document their understanding of the TA and their expectations.

For example, a responsive TA form might collect information on when the request came in, who made the request, the topic of the request, the resources we provided, and when we closed out the TA or support. For intensive TA, the form may include a space for follow-up conversation and further clarification on how the TA evolved as we spent more time working with the program.

This type of documentation can point us towards "critical moments" in the TA that we may choose to explore through other evaluation tools we talk about later in this module. The goal of the planning form is not just to project manage the TA but to monitor and track TA consistently so that we can pull together that information and make strategic decisions about TA. This tool is best when co-created with users of TA and others who might use tracking and monitoring information in order to determine what is most valuable to know about TA over time.

SAMPLE TA RECORD FORM

[Coalition Name]

TA Provider Name:______________ Date:______________

TA Recipient: & Program:______________ Contact Info:______________

Type of TA

☐ Responsive ☐ Proactive ☐ Intensive ☐ Other

TA Focus Area(s)

- ◊ Organizational Development
- ◊ Sexual Assault Services
- ◊ Fiscal Management
- ◊ Anti-Oppression
- ◊ Training
- ◊ Technical Assistance
- ◊ Rural
- ◊ Supervision
- ◊ Systems Advocacy
- ◊ Membership

Date TA Delivered:

Notes and Comments:

Next Steps or Follow Up Needed

☐ Resource ☐ Phone Call ☐ Referral ☐ Other

Notes:____

____

____

Adapted with permission from the Iowa Coalition Against Sexual Assault's TA tracking form

Tracking Tools

A way to store data collected through a TA planning or record form or even on-going survey data is helpful and often necessary when providing a lot of TA. The most cost-effective way to track TA and quickly access this data is in an Excel spreadsheet or other database that is familiar and accessible.

To create a database for tracking TA, start by mapping out on paper all the types of information you want to know on a regular basis about reach. For example, many people track:

- Type of TA
- The date of TA delivery
- Where the TA is delivered
- Information about who participated in the TA (e.g. name, affiliation, demographics, etc)
- What the TA was about
- TA provider
- Satisfaction ratings
- Etc.

For each of these data points, define clearly each data point, what the range of data responses might look like (i.e. predetermined categories or labels, a specific or infinite set of numbers, etc) and who is the best source for that data.

Put this information into a “data dictionary” and make it available to anyone who might be collecting or inputting this information into the tracking database (see next page)

Once your data dictionary is complete, you can then go into a database and design either a spreadsheet or form to collect this information.

Data Point	Purpose of Data	Range of Data	Source
Type of TA	Describes the type of TA delivered.	Intensive Responsive Proactive	Coalition staff member
Date TA Requested	Identifies the initial date of the TA request or event date.	Mo/Day/Yr or Mo/Yr	Coalition staff member
Date TA Delivered	Identifies when the TA was delivered. Depending on the type of TA it may be the same date as "Date TA Requested". This allows us to track response time of TA.	Mo/Day/Yr or Mo/Yr	Coalition staff member
Name of Program	Identifies which program is receiving TA.	Program name or "not relevant"	Coalition staff member or program staff on event registration or request form

Google Sheets is an easy-to-use, free place to store your database so that multiple people can have access to it. Make sure to use the "share" button (top right in green) to identify the specific people who will have access to the database. You can give them permission to edit (add data), comment, or view only.

Feedback Surveys or Interviews

Feedback surveys or interviews assess whether the TA provided met the needs and expectations of those using TA. Typically, feedback surveys or interviews rely on a standardized set of questions, across multiple types and users of TA. With standardized information we can ask questions like: *Where are we seeing the greatest need for TA? What are the types of TA we have the resource to provide more efficiently? Where do we need to focus our evaluation and learning efforts to improve response time?*

Satisfaction surveys and interviews are most informative when they immediately follow TA and it is fresh in the user's mind. Because they are regularly administered, satisfaction surveys and interviews should be limited to a small number of questions that take no more than 10 minutes of somebody's time. As much as possible, surveys should be anonymous; however, we recognize this may not be possible for all coalitions given their size and demographics of their state or territory.

The data collected through satisfaction surveys or interviews is relatively straightforward to analyze. The most common trap in analyzing and using satisfaction data is in focusing on the perspective of the majority and not questioning enough the responses and perspectives of individuals that are less common.

For example, it is easy to look at survey results and say, "The majority felt the training was good or excellent, so good job us!" and move on repeating the training with other programs. However, in doing so we may be disregarding the perspectives of 1/3 of the people in the room. To get more useful information from satisfaction surveys and interviews, consider combining these tools with other evaluation tools and analyzing the data to a level of specificity to answer questions like: "When people reported they were less satisfied with our TA, what type of TA was it? Or what can we say about what was unique or different about this TA? "

Some commonly used software may have embedded tools that track information about the person responding and use and sell that data. It is important to investigate and understand the privacy conditions of the software being used.

In terms of designing satisfaction surveys or interviews, there are a lot of tools out there to help pick questions and assign scales for close-ended questions. Be sure the ways in which questions are worded and response options are presented are culturally affirming. One way to ensure is to have people test or pilot the survey tool before using it for evaluation purposes.

Another great feedback tool was designed by one of our colleagues at the Texas Association Against Sexual Assault that demonstrates how to translate our values into survey design.

Tools for Evaluating Results

Evaluating for results or outcomes is needed to demonstrate why our work is important. Many of the results we seek will take a long time to be visible, so in thinking about how we evaluate for results we want to build a practice that looks at short-term outcomes (what we would we see immediately from our TA and support) and long-term (changes over time). Our theory of change or roadmap will signal whether we are looking to evaluate short- or longer-term results as well as the different types of results we want to measure. For example:

Individual level:

- Increase in knowledge or skills
- Change in perspective
- Increase in confidence
- Change in behavior

Program or Organization level:

- Application of new practice or policy
- Improvement in outcomes
- Change in capacity

Survivor and/or Community:

- Increase in the number of supports for survivors
- Changes in policies or practices within the justice system or health care
- Changes in community narrative about sexual violence and its root causes

The tools we need to evaluate results need to help establish how things looked prior to the TA, what the intended results were for the TA and what unintended results may have occurred. In addition, evaluation can help tell us how these results came about.

One way to assess change is through pre/post and retrospective assessment tools. However, there are an increasing number of tools to evaluate results beyond pre/post and retrospective assessment. For the purpose of this toolkit, we are going to focus primarily on facilitated tools that align gathering data with inclusive interpretation and making meaning from the data.

Many of the results we seek will take a long time to be visible, so in thinking about how we evaluate for results we want to build a practice that looks at short-term outcomes and long-term changes over time

For specific "how to's" and examples for these tools and many more, we recommend spending some time on the Better Evaluation website.

Outcomes Harvesting

Outcomes Harvesting is a way to evaluate against results that were not predetermined by a theory of change or roadmap. It is a good tool for evaluating a new approach to TA when we are not sure what outcomes we may see. Outcomes Harvesting uses a multi-step process for identifying examples of what has changed (outcomes) as a result of the TA and then, working collectively to determine whether and how the TA contributed to these outcomes.

Outcome Harvesting is designed to be highly inclusive of those using and benefiting from TA, as well as those who need the evaluation to make decisions about TA. There are six steps to the Outcomes Harvesting process, but generally the focus should be on getting quality responses rather than rigidly following the specific steps.

Most Significant Change

The Most Significant Change approach identifies multiple examples of changes that occurred and then uses a process to help discern which results are most valuable and why. There are three basic steps to MSC:

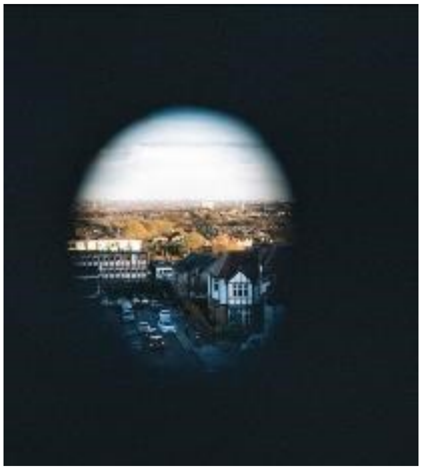
- Deciding the types of stories that should be collected (e.g. practice changes, behavior changes, changes in narrative or framing of sexual violence)
- Gathering up these stories from people who have them
- Sharing the stories and discussing what is valued about these stories

When best done, an MSC process is facilitated in a collaborative way where users of TA can hear from each other about their own most significant changes. Collectively, themes can be pulled out from various stories. MSC is not a quick option and we need to be careful that the stories collected for this purpose do not get used without permission.

MSC is extremely friendly to most groups. Stories can be oral, written or in any other expressive form. A good MSC process needs only two or three framing questions. For example, these might include:

- From your point of view, what was the most significant change that resulted from [xyz]?
- Explain why you chose this change?

- Are there any lessons arising from the change you have written about?



Note, most significant change stories do not need to be collected at the same time as themes are being discussed. MSC stories can be collected over several months or even years. They can be collected over the phone or e-mail. However, we need to attend to how that story is being presented for interpretation during the evaluation, especially if the storyteller is not there to share their story in person.

MSC is a good example of what we could call "evaluation as intervention". Many narrative and storytelling approaches have the benefit of communicating our ideas and values through TA while also evaluating the results.

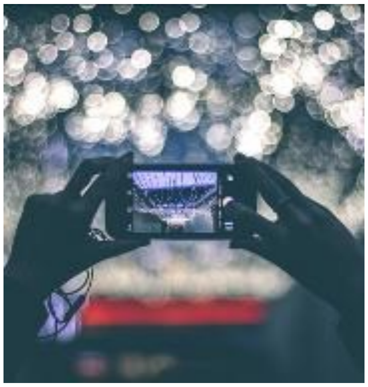
Success Case Method

The Success Case Method allows us to look both at what works and does not work in TA. This tool identifies the most and least successful cases to understand the impact of TA. Using extreme cases, the evaluation asks:

- *When the TA works, how well does it work?*
- *When the TA doesn't work, why not?*
- *What is working, and what is not?*

SCM gives programs, survivors and community an opportunity to tell us what worked and what did not. SCM uses survey data to identify what defines success and what does not. It then looks for examples to use in interviews to help examine what drives success and what does not.

Photovoice



Photovoice is a fun and interesting way to engage around evaluation. It is particularly rewarding for youth and other people who like to get creative. Photovoice is relatively unguided until the end. Together with individuals you want to inform the observation, identify a question about what the change resulting from TA might look like. Then put a camera in the hands of people and step back and wait for them to share through email, social media, or whatever medium is easiest. Accumulation of these stories serves as “data” for a facilitated discussion about why they chose these images and the significance to them.

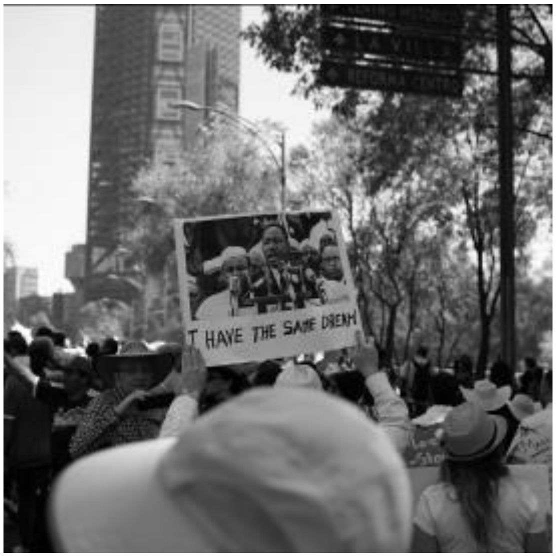
Many social media tools today make it unnecessary to come together in person to make meaning of the data. By encouraging the use of #hashtags and taglines when posting the media, the interpretation can be done all at once. Strategy teams can then reflect on social media posting data to inform adaptation to TA design.

Tools for Evaluating Learning Environment and Relationships

The impact of the learning environment and relationships on TA are critical components to our values-based approach. These two factors are difficult to measure using conventional evaluation tools. A good understanding of the role of these two components requires developing a shared understanding of what these conditions look like in practice.

Learning Environment and Relationship are distinct concepts, but they are also interrelated and the tools that inform one can also help inform an understanding of the other. Our goals in evaluating these two factors are to:

- Understand how the learning environment has the potential to facilitate changing of mindsets and the healing process
- Leverage the strengths of providers of TA, users of TA, community and survivors to address sexual violence
- Identify power dynamics that sit between providers of TA, users of TA, community and survivors, and call attention to these dynamics and work to equalize them to every extent possible



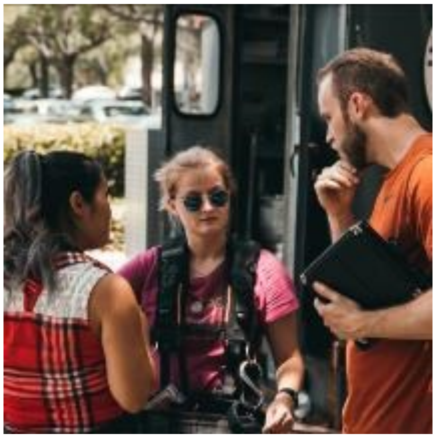
Like the tools for measuring outcomes, examples of how they have been used can be found on-line beginning with Better Evaluation.

Appreciative Inquiry (AI)

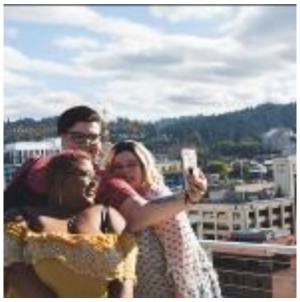
Appreciative Inquiry looks to identify the assets and strengths of individuals and groups with the goal of sustaining those that are most valuable. The AI Commons uses a 5-D model for implementing AI.

- Definition: What is the focus of [the TA concept]? Clarification
- Discovery: What gives this focus life? Appreciation
- Dream: What might we need or be looking for in this [TA]? Vision
- Design: What should the [TA concept being explored] look like? Co-Creation
- Deliver: What will the [TA concept] be? Innovation

AI requires a high level of engagement during and after the process and can often serve to spur desired changes from the process. AI can be a lengthy process and requires spending a considerable amount of time getting to know the individuals and communities whose assets you want to understand.



Power Analysis



There are lots of different types and layers of power at work in TA and support. Our job is to uncover and find ways to create inclusive environments and address equity. Power can both enable action and constrain the actions possible in a given situation. By exploring the power dynamics, we can understand how programs are arriving at decisions, whose voices are being left out, what might be impeding action, etc.

To a large degree power analysis is an intentional reflection on the roles and relationship involved.

(Resources on next page)

The worksheet on types of power can help surface a discussion about power and its impact using several different facilitated approaches.

Racial Equity Tools has tools, research, curricula, and ideas for individuals and groups looking to increase their understanding of equity, as well as to act to achieve social justice.

Race Forward is an online hub for research, tools, and information on advancing racial justice.

Journaling and Art

These tools allow participants to use their artistic and creative abilities to reflect on TA and their experience with it. Especially for long term or intensive TA, people involved can be asked to keep a scrapbook or journal throughout the process around some agreed upon key questions (i.e. tracking conversations and how they understood message contained in those conversations, changes they saw or heard in interaction and what prompted those changes, additional needs that are surfacing, or feelings at certain moments during the TA. Having these documented allows the people involved to come together at regular intervals or critical moments and reflect on everyone's experience and what that means for the next step. More creative people may want to document their journey in the form of drawings, quilting, pottery or other forms of art that capture the moment. This type of tool has healing elements to it as well.

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