Resource Sharing Project
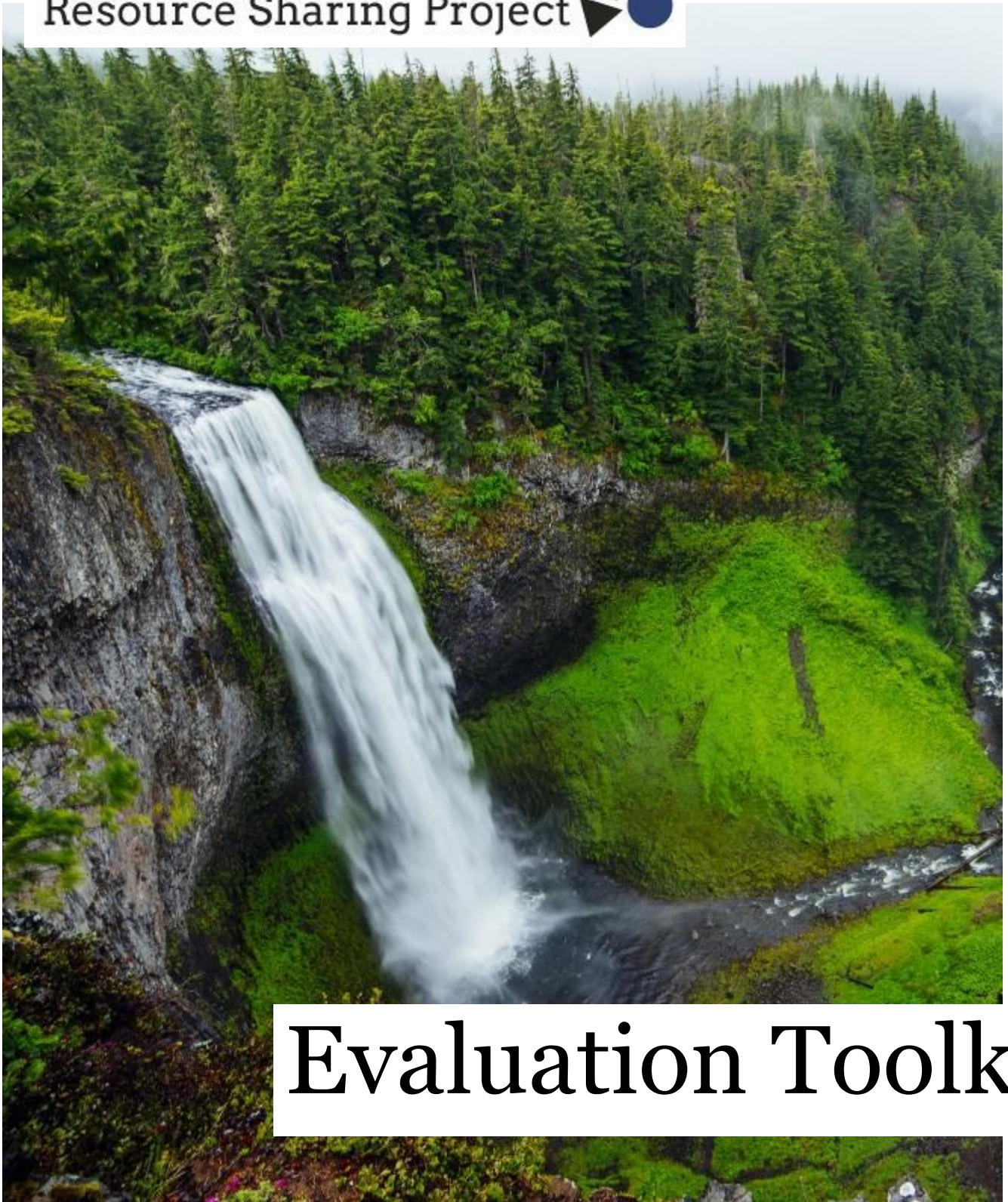
NATIONAL SEXUAL ASSAULT COALITION

Evaluation Toolkit

MODULE ONE

Introduction

Resource Sharing Project

Evaluation Toolkit

Module One: Introduction

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

All photos courtesy of Unsplash.com, Pexels.com, or Pixabay.com unless otherwise noted.

TABLE OF CONTENTS

INTRODUCTION

Technical assistance (TA) is one of the central pillars of partnership between coalitions, local programs, and allies. TA takes on many forms including sharing information and expertise, instruction, skills training, transmission of working knowledge, and coaching. The Resource Sharing Project (RSP) approach to TA is one that models the values critical to addressing the questions and challenges of our partners, encourages growth and expansion of practices to support survivors, and addresses emerging needs in a changing context.

This toolkit offers evaluation tools to evaluate the delivery of TA by coalitions to programs and communities using the same values approach. It was developed so that coalitions can better understand what TA is needed, what TA approaches are working, what can be improved about our TA, and what we can learn from each other to do our work better.

The toolkit contains seven modules on how to set up an evaluation practice that is aligned with a coalition's broader values, how to conduct evaluation of TA using these values, and additional resources for expanding our toolbox on evaluation in general.
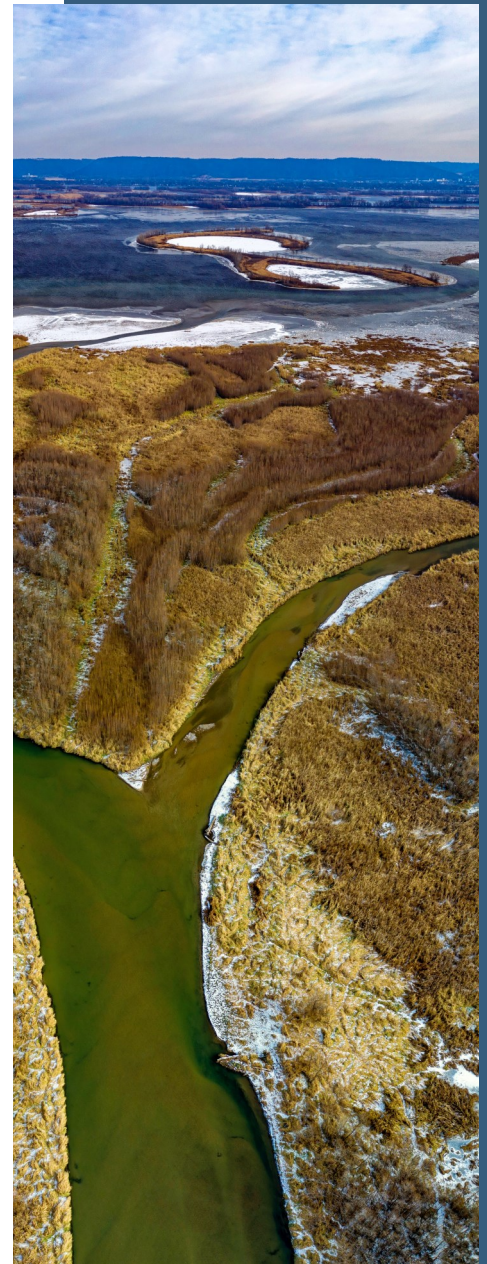
The modules in this toolkit include:

Module 1: Introduction (you are here!)

This module provides a high level overview of the values, practices, and approaches that guided the selection of resources and tools included in the toolkit. This module provides us with a way of talking about evaluation as being inclusive and values-based.

Module 2: Evaluation Practice Guidelines

This module provides a framework for establishing a set of evaluation practice guidelines to help organize how and when we do TA evaluation practice and the ethics and expectations for staff responsible for evaluation.

Module 3: Planning for TA Evaluation

This module discusses considerations in designing a values-led evaluation for TA. It provides tools to decide what type of evaluation approach is best for the TA being delivered, how to develop and prioritize evaluation questions, and how to engage multiple perspectives in evaluation design, implementation and use that reflects the values and practices we embody in our coalition work.

Module 4: Tools for Evaluating TA

This module provides specific tools and resources for gathering different perspectives to inform our evaluation and how we can turn that data into meaningful information by applying culturally affirming and

inclusive practices during these phases of evaluation. It includes tools that honor stories and experiences of those using the TA in helping us learn about our impact and ways we can move beyond reports for sharing what we have learned.

Module 5: Tools for Moving Beyond the Report

This module discusses important considerations around how the data we collect gets used and introduces some tools and resources for helping others engage with evaluation data in a way that leads to action.

Module 6: Tools for Shared Learning

This module introduces tools that support learning and evaluation in complex environments where the outcomes are not easy or quick to achieve. These tools support coalitions in understanding how our TA is changing systems and ways we can use evaluation practice in real-time to adapt our work and get better results.

Module 7: Summary and Supports

The RSP is built on an eagerness to learn. This module provides a pathway for sharing feedback on the toolkit and additional resources in a resource library to extend learning beyond this toolkit.

ABOUT THIS TOOLKIT

This toolkit was informed through the gathering of multiple perspectives including the RSP leadership team, the Communities of Color Leadership Cohort, coalition representatives who participated in focus groups, and Spark Policy Institute evaluators.

Throughout the toolkit, there are a couple of symbols we use to help further illustrate the topic we are covering.

signals an example of a resource or tool that can be used in evaluation

signals a coming together of some ideas based on experience in applying a practice over time

signals an idea for further discussion, reflection, or conversation

WHAT IS VALUES-LED EVALUATION?

In 2018, the [American Evaluation Association](#) themed its annual conference *Speaking Truth to Power*. The theme challenged those who practice evaluation to question:

• What is **power**? Who has it, and how can they best be influenced? What is the power held by evaluators and evaluation?

• What is **truth**? Whose truth? How can we best discover these truths?

• And, what is **speaking**? Whispering? Public pronouncements? Influence? Activism? And by whom on behalf of whom?

This challenge stems from a more mainstream notion of evaluation that what it produces can only be trusted if it is based on quasi-experimental and experimental evidence, and if it is sourced by "unbiased" quantitative data gathered by an evaluator who holds a higher level of objectivity and expertise. We know in our work that this is not the only way to do good evaluation. We also know that often this approach does not accurately capture all we need to know to support survivors.

If we are "speaking truth" the idea that evaluation can be values free is counter to what is intended by its name "e-*valu-ation*"—values. Good evaluation is anything but value free – values are reflected in who is considered expert enough to do

> *Good evaluation is anything but value free*

the evaluation, the things we choose to evaluate, the questions we ask, the tools we choose, the data we collect and the way we share and learn from the evaluation.

This toolkit recognizes the inherent practice of judgement in evaluation and the power that comes with it. In this toolkit, we are choosing to embrace the notion of value in evaluation and be more intentional and reflective on how the values we embrace are further leveraged in our evaluation to get better results. In action, this means not taking shortcuts with our evaluation by relying on mainstream approaches only. Rather, we recognize that what and how we evaluate does influence and has the potential to positively reinforce our values while still resulting in an evaluation that holds rigor.

RSP VALUES FRAME FOR TECHNICAL ASSISTANCE & EVALUATION PRACTICE

The toolkit is anchored in four core frameworks that guide RSP technical assistance goals:

Trauma-informed

Survivor-centered

Anti-oppression

Adult learning principles

It brings together elements of these frameworks to inform and guide what methods and approaches best support evaluation design and the development of tools including how we gather perspectives, interpret and report on those perspectives, and apply what we learn in our own organizations and communities.

For each of these frameworks, we have a set of TA delivery practices to reinforce the values and through this toolkit encourage the setting of evaluation norms and practices that do the same. Although the field of evaluation is knowledgeable about these frameworks, there is not yet a prescribed way to ensure they are included in all evaluations.

The types of questions that need to be asked when using these principles to anchor evaluation include:

- When is the appropriate time to evaluate?

- What is appropriate to evaluate and why?

- Where should the evaluation take place?

- Who should design the evaluation?

- Who should lead the evaluation?

- What perspectives are important to know to achieve our purpose?

- What are the appropriate tools and approaches to collect diverse perspectives?

- What questions are important to ask and how do they need to be asked to get the perspective needed to achieve the purpose?

- How can the evaluation activities be done in ways that provide physical and psychological safety for everyone involved?

- Who needs access to these perspectives?

- How do we come to understand what these perspectives mean within the context of our work and in the context of those participating in the evaluation that extend beyond our work?

- What are the ways in which we can share diverse perspectives that are respectful of the perspectives provided and further advance these core principles?

Many of these questions we will ask when we develop our evaluation practice guidelines (see Module 2) and each time we are practicing evaluation.

Trauma-Informed

A trauma-informed perspective recognizes that deeply distressing events can overwhelm an individual's ability to cope, cause feelings of helplessness, diminish a sense of self and change the way a person experiences interaction with others. A trauma-informed perspective makes no assumptions about who experiences trauma or the severity of that trauma; rather it acknowledges that we need to approach each interaction with generosity. The core practices of a trauma-informed approach are:

- **Cultural competence**: Striving towards awareness and affirmation of an individual's beliefs, values and norms and how they influence interactions

- **Physical and emotional safety**: Respects and provides for individuals to feel safe and protected from further harm

- **Trust**: Communications and actions are clear, consistent, reliable and respectful of boundaries

- **Choice**: All interactions are voluntary and there are multiple options and pathways for access

- **Collaboration**: Power and decisions are shared

- **Empowerment**: Space to build skills and self-agency

Additional Resources

🖉 Five Ways to do Trauma-Informed Evaluation is a recent blog post from an evaluator on how she is applying trauma-informed approaches in her evaluation practice.

🖉 The ACES Connection Resources Center provides guides, presentations, assessments and other resources to help position trauma-informed and resilience-building practices.

Survivor-Centered

The survivor-centered approach seeks to ensure that the rights, needs and wishes of survivors are prioritized over the needs of those providing the services. It also means ensuring that survivors have access to appropriate, accessible and good quality services that can be informed by solid evaluation. The survivor-centered approach is justice oriented and includes the following rights:

- To be treated with dignity and respect
- To choose a course of action in dealing with the violence
- To privacy and confidentiality
- To non-discrimination
- To comprehensive information to help make their own decision

Additional Resources

🖉 Getting Started with Survivor-Centered Evaluation is a presentation on how Oregon's Safer Futures Program incorporated trauma-informed and survivor-centered frameworks into understanding their evaluation practice.

Anti-Oppression

The anti-oppression framework unpacks power at all levels. Within the context of TA delivery and evaluation, this approach ensures that we consider power dynamics associated with:

- **Social difference**: Disparities of power between the dominant and dominated social groups, including race, gender, class, sexual orientation, disability. age, religion, region, mental health and single parenthood, etc.

- **Personal and political identities**: An individual's life situation in relation to social systems such as the family, peer groups, organizations, and communities

- **Access to resources and decision-making control**: Social, cultural, economic and psychological factors around how individuals or groups gain differential access to resources and positions of power

- **Historical and geographical place**: Individual life experiences and events within a specific time and place; these experiences are given meaning within the context of prevailing ideas, social facts, and cultural differences

- **Reflexivity/mutual involvement**: The continual consideration of how values, social difference and power affect the interactions between individuals

The Equitable Evaluation Initiative (EEI) is a new movement in the field of evaluation that calls evaluators to be more intentional about implementing evaluation work that:

- Is in service of *equity* including the production, consumption, and management of the evaluation;
- *Answers critical questions* about how historical and structural decisions have contributed to the problem, the underlying systems of inequity, and how cultural context influences the desired change; and
- Is designed and implemented with the *values* underlying the work

Adult Learning

Technical Assistance is about transferring knowledge, skills and information from one person or entity to another so that it can be applied. Effective coalition-led TA is designed with adult learning principles in mind. Adult-learning practices understand that:

- Training is best received when a learner has autonomy

- Learning most often happens when learners can connect the TA to what they already know of or have experienced

- Quality learning provides hands-on experiences

- Mistakes are often the most valuable teacher

- Learners are motivated when they play an active role in how the TA is designed

- Learners want purpose-driven training, with appropriate incentives, alignments with goals, and measurable ways of tracking progress

- Learners are driven by internal motivation, not the approval of others

---

Additional Resources

🖉 [Human Centered Design](#) is neither an evaluation approach nor technical assistance model, but rather a design and learning process that speaks to empathy and creativity. It is used to create processes that are person-centric and high impact.

ALIGNED EVALUATION METHODS & APPROACHES

Our experience with mainstream evaluation approaches is that they do not adequately reflect the values and principles important to our work and that they often result in furthering mistrust and marginalization of communities of color, immigrants, LGBTQ+ and other groups and individuals without access to systems of power and influence. It can also be difficult for those that do not regularly do research or evaluation to determine whether an approach or a partner supporting our evaluation work truly understands what it is we hope to achieve.

There are some evaluation frameworks that are inclusive and participatory because they engage diverse perspectives in the evaluation process and center evaluation around learning to better support organizations, communities and individuals. Several frameworks bridge mainstream evaluation practices with intentional learning, perspective-gathering, and storytelling tools that speak more directly to our values.

Several frameworks bridge mainstream evaluation practices with intentional learning, perspective-gathering, and storytelling tools that speak more directly to our values.

Here we provide an overview of three approaches to evaluation that, when done right, align with our anchor principles: trauma-informed, survivor-centered, anti-oppression and adult learning. We do not expect to be experts in these approaches. Rather, access to and understanding of the core principles of the evaluation world allows us to engage with an evaluation community that shares our passion for the way we work.

Community-Based and Participatory Action Research and Evaluation (CBPA-R/E)

Action research is oriented around a worldview where the evaluator and those participating in what is being evaluated are co-investigators in the data collection, analysis and communication of findings. A CBPA-R/E framework, when done well, builds community trust leading to better evaluation practice, better learning and ultimately better results. CBPA-R/E is most often used to establish effectiveness, in our case, the effectiveness of a technical assistance model or program.

CBPA-R/E can be both academic (research-focused, usually in an institutional setting) and applied (usable and action-oriented for the community or intended user). This approach works best when you are trying to:

- Yield a more complete and accurate understanding across perspectives
- Generate information that will lead to technical assistance strategies that address needs more directly
- Build capacity to engage with and implement evaluation practices in other areas of an individual's life
- Positively influence how people perceive themselves and what they can do

- Break down barriers that signal power

There are many examples of CBPA-R/E, but not all are done equally well. It is important to recognize that good CBPA-R/E requires considerable investment and resources towards developing the skills and capacities to participate equitably in the research process or it can quickly become a token form of evaluation.

Community-Based and Participatory Action Research and Evaluation (CBPA-R/E) Examples & Resources

The Community-Based Participatory Research Toolkit developed for research and advocates working to address domestic violence explains how CBPA-R/E can help answer important questions about what works for communities. The toolkit is rooted in the value of fostering equity in all its work.

This Community Research Lab Toolkit developed by the Healthy Cities Initiative provides a detailed look at methods and tools for community-based organizations to implement place-based CBPA-R/E. It includes how to create questions and conceptualize, gather, and use data, with tips for analysis, visualization, and methods.

Speaking Truth, Creating Power provides an example of how to conduct community-based participatory research around policy in the context of an anti-oppression, power framework.

Community Toolbox overviews CBPA-R/E and provides links to a breadth of on-line resources.

Developmental Evaluation

Many coalitions, like RSP, are working on complex problems that ask us to build skills to change both hearts and minds. There often are not clear solutions or pathways developed to lead this change. These conditions mean that we need to be constantly learning and ready to adapt. Developmental Evaluation (DE) is grounded in this type of systems thinking. It uses rapid evaluation techniques and real time learning to support decision-making in design, development and implementation of programs or initiatives. Rather than viewing evaluation as a distant process from implementation it positions evaluation as critical to implementation.

In DE, a member of the team plays the role of evaluator or critical partner helping to advance the work in real time by bringing data and evaluation tools into decision making discussions. DE ensures that someone is accountable to ensuring underlying assumptions that may unintentionally impact the ways in which TA is being delivered are surfaced before they influence outcomes, and that decisions are being driven by systematic learning rather than dominating perceptions.

Developmental Evaluation Examples & Resources

[Better Evaluation](link) provides overview of Developmental Evaluation and several links to framing resources on DE. Better Evaluation is an easy-to-use resource to quickly access and learn about evaluation tools and approaches.

Empowerment Evaluation

Empowerment Evaluation draws on values of inclusion, social justice and community knowledge to inform an evaluation process to put evaluation tools and capacities in the hands of non-evaluators. Empowerment evaluation supports organizations to monitor, evaluate and control how they improve their own performance. Empowerment evaluators coach individuals and organizations through a 'learn by doing' process.

Empowerment Evaluation Examples & Resources

The Centers for Disease Control developed a Seven-Step Empowerment Evaluation Approach for organizations working to prevent violence. This guide focuses on what you would look for in hiring an evaluator or supporting a staff role in the organization to lead evaluation.