Clear Horizon

Session 2: How to evaluate outcomes

Facilitated by Jen Riley

This webinar is a 3-part series on outcomes measurement for the Outcomes, Practice and Evidence Network (OPEN)

Why we're here today

Session 1: How to measure outcomes

- How do we measure outcomes?
- Selecting indicators & targets to measure outcomes
- Selecting data collection methods

Session 2: How to evaluate outcomes

- The role of evaluation questions in evaluating outcomes
- Considering data collection methods, analysis, synthesis, rubrics
- What is effective reporting
- Reporting outcomes using dashboards, infographics, report cards

Session 3: Reflecting & learning from evaluation findings

- The role of evaluative thinking – what happened, so what, now what – in learning and reflection
- How to reflect on and apply learnings through workshops, feedback loops, sprints

Learning objectives

By the end of the lunchtime session, you'll be able to:

- Review one approach for organising evaluation thinking: evaluation questions

- Understand the key steps to evaluating outcomes: analyse, synthesise, evaluate

- Understand what makes an effective report

- See other reporting methods, such as dashboards

Getting to know you...

On a scale of 1 to 5, what is your level of experience in evaluating outcomes?

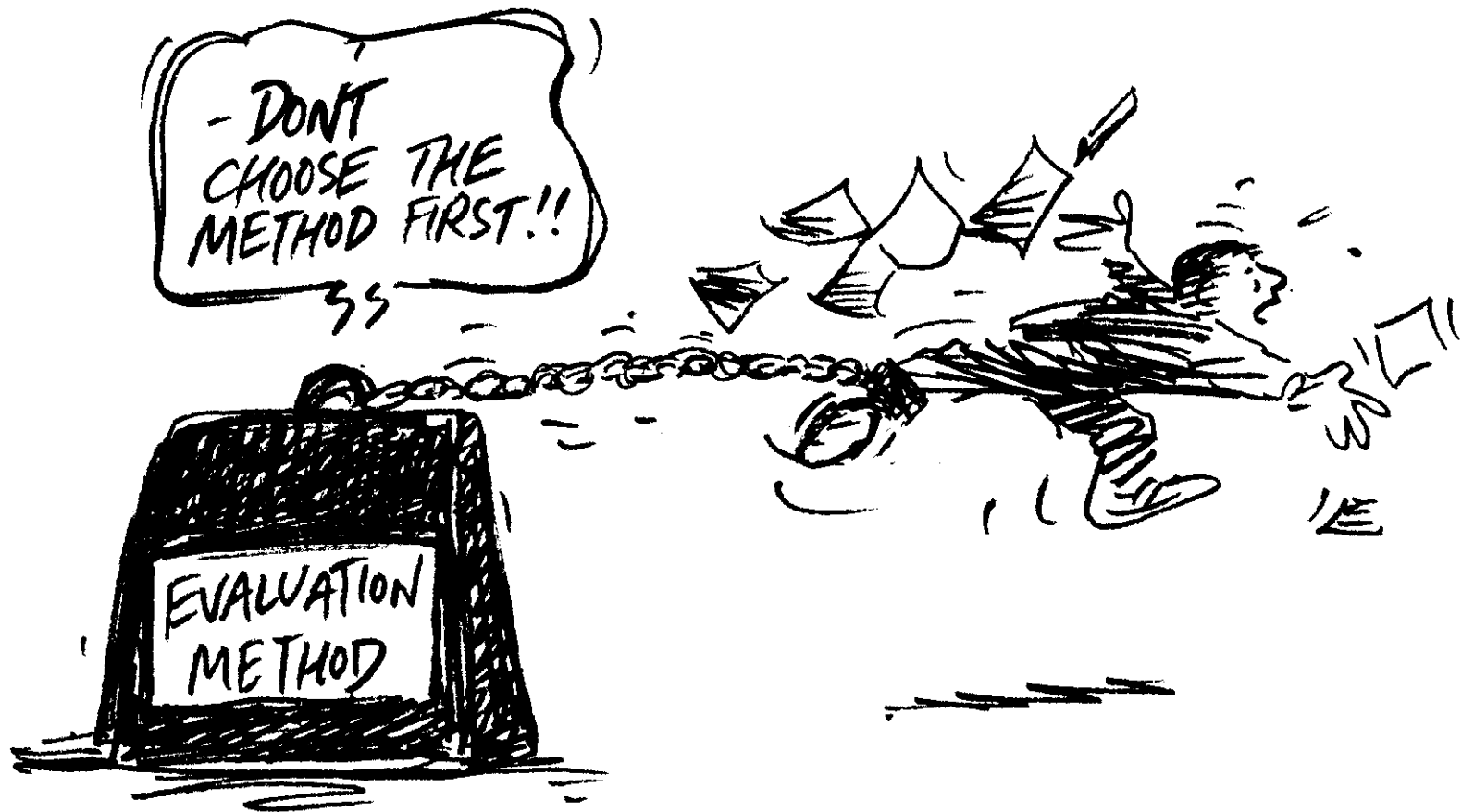1 – being "not sure what evaluation is"

5 – "it's my job"

Poll

The role of evaluation questions

- Evaluation questions are one approach of framing evaluation

- We can map these questions and corresponding data collection methods on a matrix

Using QUESTIONS to frame the evaluation of outcomes

Why?

- **Questioning** is the key to gaining the information you need to know
- **Questioning** is fundamental to successful communication

Where we use questions...

- Key evaluation questions
- Sub-questions
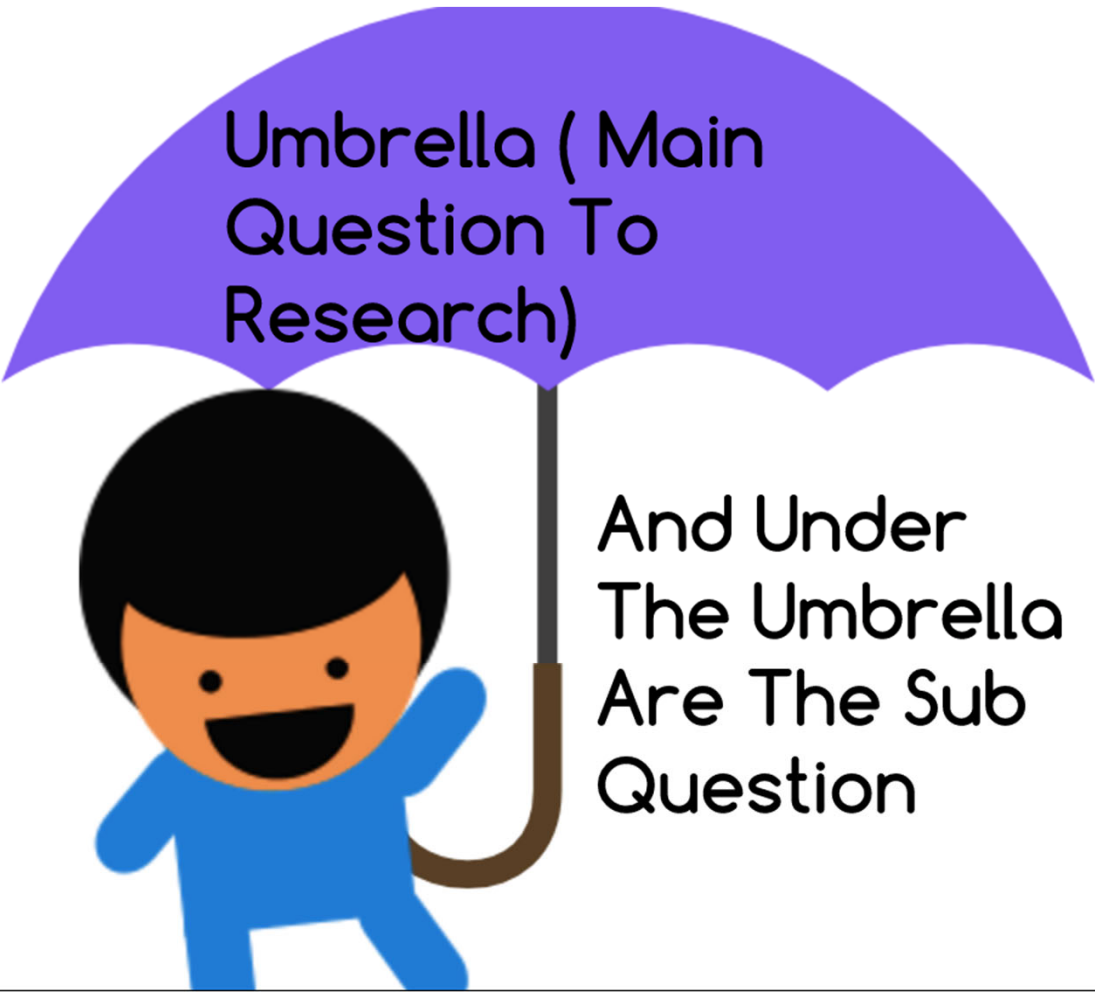- Questions we ask in an interview or survey

Key evaluation questions

What are key evaluation questions?

- Carefully crafted questions
- Are used to guide evaluation <u>thinking and planning</u>
- Provide a structure for reporting
- Not the same as survey questions
- It prompts an assessment of degree of 'value'.

i.e. To what extent have client outcomes been achieved?

Sample evaluation plan

KEQ	Sub-questions	Indicator (if relevant)	Method/data source	Target	Evaluation study/method
1. To what extent have young people successfully transitioned to earning or learning?	1.1 To what extent has the program contributed to young people improving their career knowledge and skills?				
	1.2 To what extent have young people created connections with industry mentors?				

Collect meaningful data

To make outcomes meaningful, you need to:

- Collect more than just data about how busy you have been

- Include measures, indicators and targets that provide insights into whether you are on track to achieving important things

- Your program logic/theory of change, and key evaluation questions (KEQ) can often help you identify meaningful measures, indicators and targets, and map data against these

Sample evaluation plan

KEQ	Sub-questions	Indicator (if relevant)	Method/data source	Target	Evaluation study/method
1. To what extent have young people successfully transitioned to earning or learning?	1.1 To what extent has the program contributed to young people improving their career knowledge and skills?	% of young people that demonstrate the knowledge and skills to successfully transition to earning or learning.		By 2020, young people report having the knowledge and skills to successfully transition to earning or learning.	
	1.2 To what extent have young people created connections with industry mentors?	% of young people that report having strong relationships with industry mentors.			

Clear Horizon

Designing data collection methods

What to consider

What are the best way(s) to collect the information you need?

What is most feasible in terms of available:

- Time
- Budget
- Human resources (both time and skills)
- The various biases of the methods

Think about design and analysis BEFORE you collect data!

Key steps to designing data collection

What information do you really **need** to know?

- Always tempting to collect the 'nice to know'
  - Good test is to ask yourself how you will use the answer: if you don't know, you shouldn't ask!
  - Tip: Use **subquestions** to guide your what data you need to collect

How will you get this information?

- What **data collection method** will you use?
  - Need to match to a) what information you need (at what level of quality) and b) available time, skills and resources to collect, enter and analyse data
- How will you **ask your question(s)**?

Who will you get this information from?

- Having a sensible (and documented) sampling process

How to select methods

Characteristic 1	Characteristic 2	Example good combinations
Breadth	Depth	Broad scale survey + focus group/in-depth interviews/case studies
Expected	Unexpected	Counting predetermined indicators + MSC
Experiential	Expert view	Interviewing participants + interviewing a subject matter expert
Experiential	Observation	Interviewing participants + non-participant observation
Experiential	Factual evidence	Interviewing participants + checking consumption, such as auditing rubbish bins

Sample evaluation plan

Sample evaluation plan

KEQ	Sub-questions	Indicator (if relevant)	Data Source	Target	Evaluation method
1. To what extent have young people successfully transitioned to earning or learning?	1.1 To what extent has the program contributed to young people improving their career knowledge and skills?	% of young people that demonstrate the knowledge and skills to successfully transition to earning or learning.	Survey and observation	By 2020, young people report having the knowledge and skills to successfully transition to earning or learning.	Statistical analysis
	1.2 To what extent have young people created connections with industry mentors?	% of young people that report having strong relationships with industry mentors.	Interviews with stakeholders		Thematic analysis

Sampling

The process of deciding who you will gather data from

Often impractical to include everyone from your population of interest in your evaluation

- e.g. may not be feasible to interview all new arrivals in Barwon South West

Some key sampling types

- **Random:** All members of your population of interest have an equal chance of being selected
- **Purposive:** Certain members of your population of interest are invited to participate e.g. have a particular perspective of interest
- **Convenience:** Based on whomever is available e.g. All those who attend a homework club on a particular day

Developing tools

You almost always need to develop a **tool** to collect your data

- E.g. questionnaire, interview guide, observation checklist, story template etc

You generally don't have to start from scratch

- Often easiest to build on what has been done before: at your organisation or other related agencies, standardised tools

You should:

- Make it very **clear** (anyone could pick up your tool and use it in the same way you would – lots of instructions, clear formatting etc)
- **Test** it with multiple people, ideally some from your target population

Designing survey questions

Closed questions have a limited number of response options

- Most common: questions where you can only respond yes/no
- Questions where you prompt an answer e.g. do you agree or disagree with...
- Good for obtaining facts, getting information quickly and in a consistent manner, and allow for faster data entry and analysis

Open ended questions

- Questions that allow someone to give a 'free form' answer
- Good for understanding more about a person/situation
- Often take longer to answer; data entry and analysis generally takes longer

Make sure you carefully design your questions

- Decide if need open/closed; clear wording; appropriate response options
- Avoid asking two questions in one

Before we move on to analysis and synthesis, any burning questions about how to select data collection methods and tools?

We'll have another chance at Q&A at the end of this session.

Review

Consider data analysis

Who's been **guilty** of collecting information you've never used?

- No point going to all the effort of collecting it if you don't collate it in a way that can be used

Often involves **data entry** of some kind

- E.g. into a spreadsheet or database, typing up interview notes or transcripts
- Have a plan before you collect data of who will do this, when and how

Data analysis and reporting requires **time**

- And some skill…

Consider synthesis

Once data is collected, consider how you'll integrate the evidence:

- What 'process' will you adopt to make sense of data and answer evaluation questions?

- Will stakeholders be involved in making sense of the evidence?

- How will you organise evidence from various data sources?

One way is to create an evidence matrix or results chart. The chart can be used to inform the report, or be presented during a reflection workshop (more on workshops in Session 3).

Sample evidence matrix or results chart

KEQ	Sub-questions	Summary of results	Evidence to support
1. To what extent have young people successfully transitioned to earning or learning?	1.1 To what extent has the program resulted in improved access to services for clients?	Program has shown improved management of client access and assessment of client needs, enabling clients to obtain an appropriate response earlier in their engagement with the system.	The percentage of clients identified as Aboriginal or Torres Strait Islander has increased by 20% over the 2015-16 to 2017-18 period (data trawl) According to program member survey in 2018, 75% broadly agreed higher-needs clients are accessing crisis accommodation (survey) Most clients interviewed felt that the new entry point system enabled them to get a clear understanding of their available options. (interviews)

At this point, we've considered key elements to evaluating outcomes– KEQs, designing data collection based on KEQs.

What about judgment in terms of assessing what we mean by "good".

From your experience, what are the ways to evaluate results?

Q&A

What are rubrics and why use them?

An alternative way to talk about results and targets.

They are a tailored scale that defines what is: excellent, good, adequate, and not good enough

Purpose:

- Provides an agreed set of criteria to make an evaluative judgement against.
- Can provide for a participatory process to agree on what success looks like.
- Gives the evaluators the ability to justify the evaluation on paper.
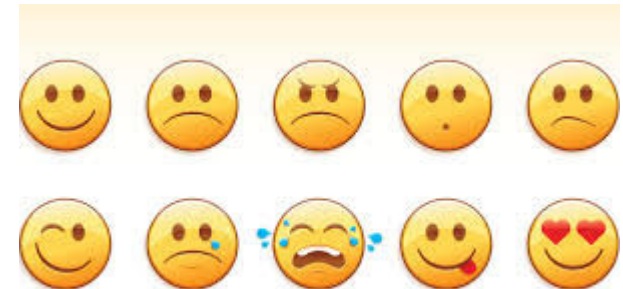
Example rubric
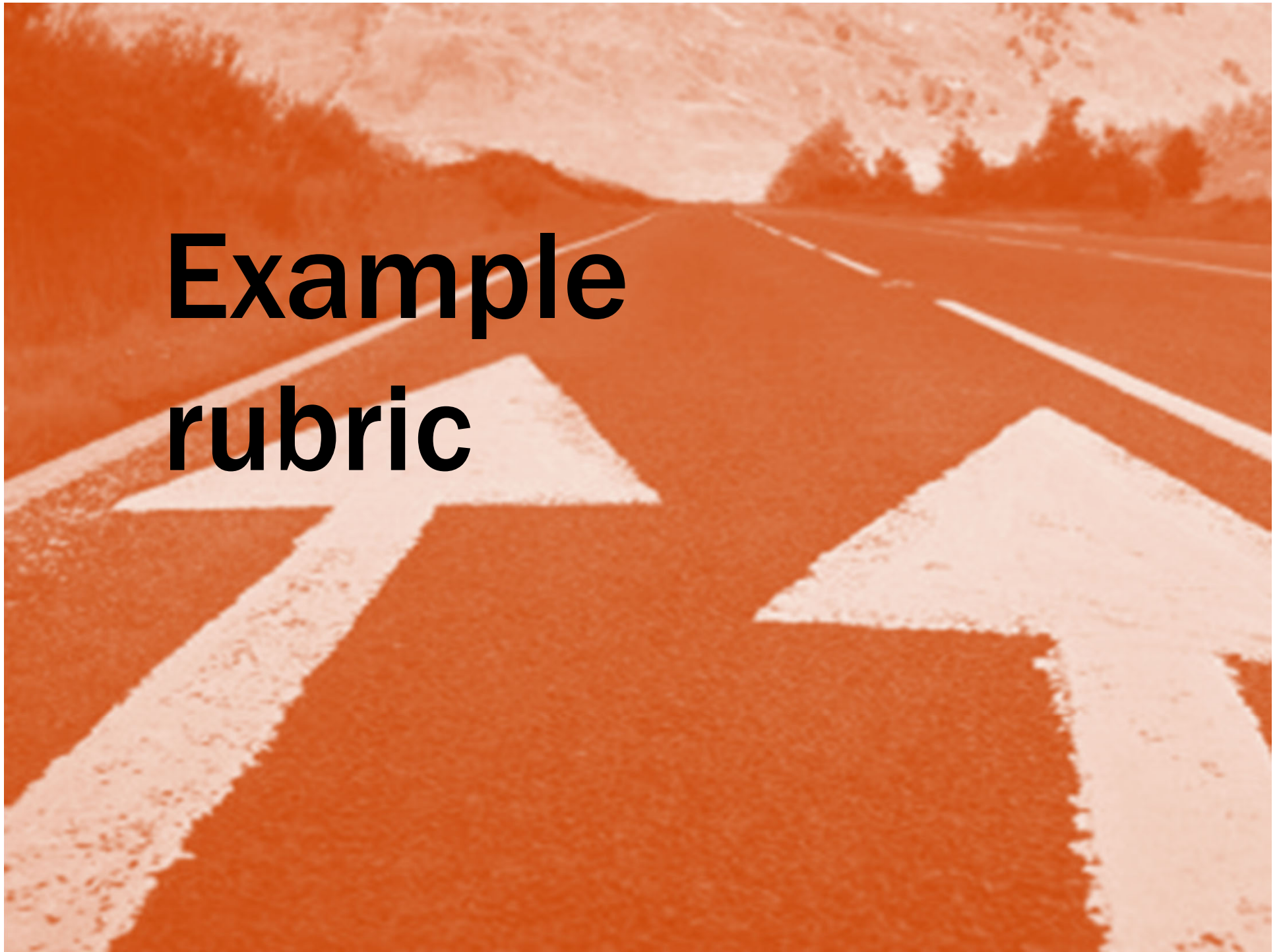
Breakfast in Bed: Analytic Rubric

	Beginning 1	Developing 2	Accomplished 3	Exemplary 4	Score
Food	Most food is colder or warmer than it should be, is under- or over-seasoned, or is under- or overcooked.	Some food is colder or warmer than it should be, is under- or over-seasoned, or is under- or overcooked.	All food is at the correct temperature, adequately seasoned, and cooked to the eater's preference.	All food is perfectly cooked and seasoned to the eater's preference. Additional condiments are offered.	
Presentation	More than one item (tray, napkin, or silverware) are dirty or missing.	Tray, napkin or silverware may be dirty or missing.	Food is served on a clean tray, with napkin and silverware. Some decorative additions may be present.	Food is served on a clean tray, with napkin and silverware. Several decorative touches are added.	
Comfort	Wake-up is abrupt, little to no help with seating, and the recipient is rushed and crowded during the meal.	Wake-up is somewhat abrupt, recipient may struggle with seat adjustment, or there may be some rushing or crowding during eating.	Recipient is woken gently, assisted in seat adjustment, and given reasonable time and space to eat.	Recipient is woken gently and lovingly, assisted until seating is just right, and given abundant time and space to eat.	

https://www.cultofpedagogy.com/holistic-analytic-single-point-rubrics/

What do you think makes an "effective" report?

In a word or two, describe an 'effective' report.

Q&A

What makes an 'effective' report?

Fit for purpose and meets the audience's needs

Generally, effective reports also:

- Answer the 'so what' question by weaving data to answer big or key evaluation questions

- Substantiate findings with evidence

- Present information clearly so an intelligent outsider can understand

- Structure sections with plenty of signposting for the reader.

Data Reporting Tips: Content

Make it **easy** for people

- No point having great data that you never share effectively with anyone – how can we learn and improve?

Different **audiences** need different things!

- Can one report realistically speak to all of these?
- Tailor contents and format of reports to needs of primary audience

Always be **clear** on the data source

- Who the population of interest is and any sampling done (how, sample size)
- How the data was collected (method used, who collected it, when)
- How the data was analysed (method used, who performed it)

Data Reporting Tips: Presentation

Make key messages stand out

- Appropriate use of **bold**, colour, - bullet points
- Document of >1 page: always include a summary at top of key points

Make it visual

- Graph (aka chart)
- Infographics
- Word clouds
- Photos
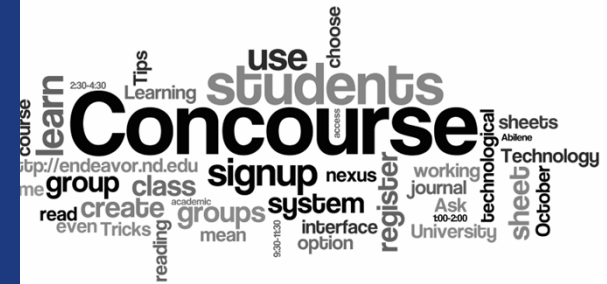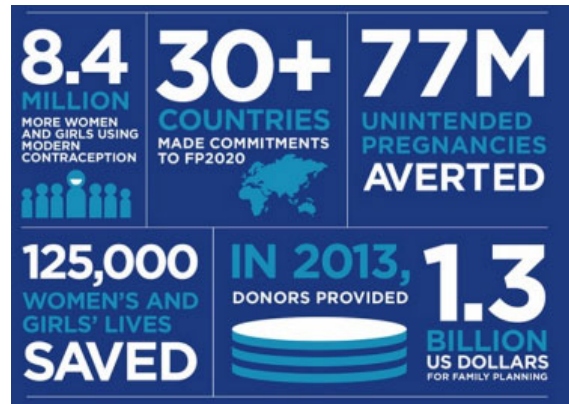
What's wrong with these?
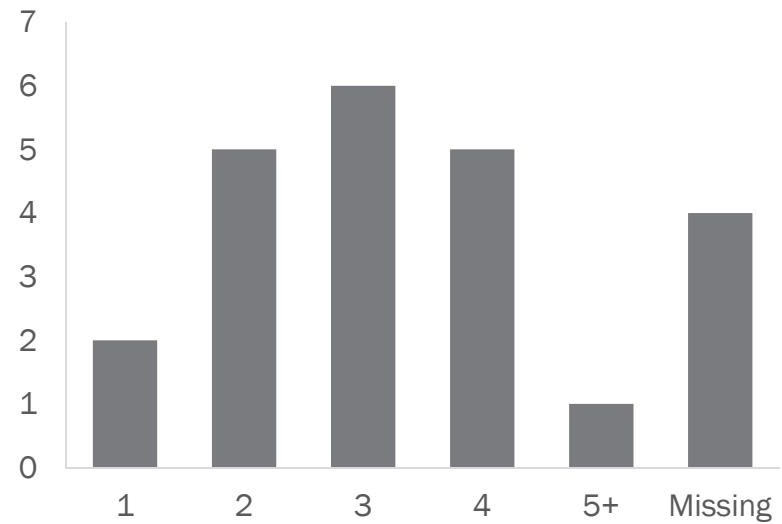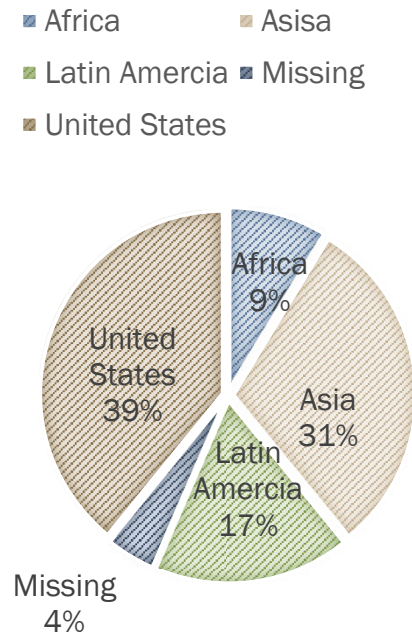
Much better!

Country where staff based
(n=23)
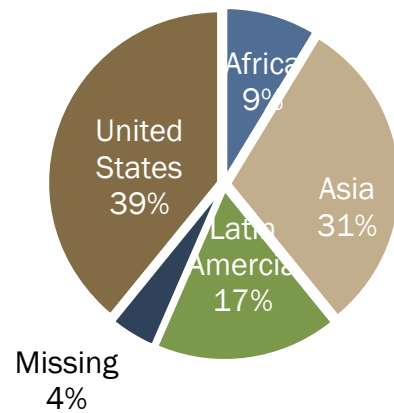
Gym visits in typical week
(n=23)
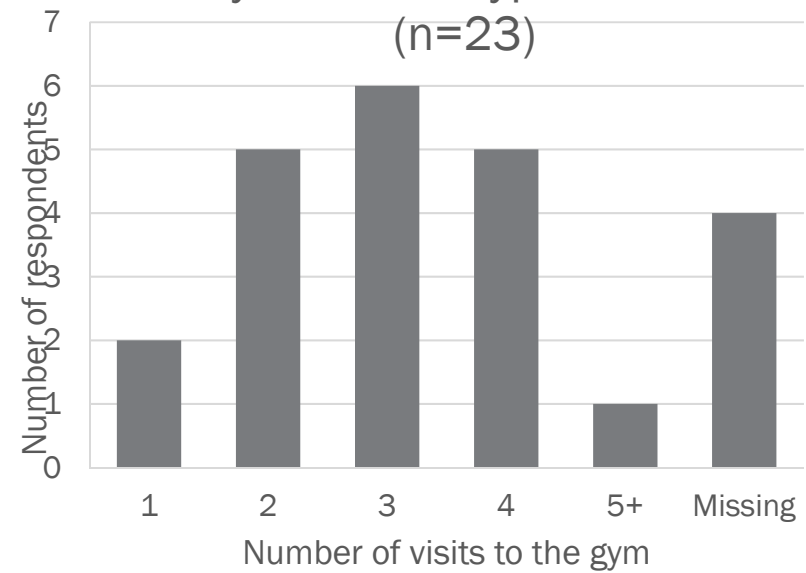
Key Online Resource

Better Evaluation http://betterevaluation.org/

- High quality yet very approachable (easy to read and understand)
- Includes the overall process of evaluation, description of different approaches and tools with links to other sites for further information

Case study: dashboard reporting

Loddon Region
Children and Youth Area Partnership

LEGEND

- Victoria Average
- Loddon Region Average
- Campaspe
- Central Goldfields
- Greater Bendigo
- Loddon
- Macedon Ranges
- Mount Alexander
- Trend

Loddon Region
LGAs

- ☑ Victoria Average
- ☑ Loddon Region Avera...
- ☐ Campaspe
- ☐ Central Goldfields
- ☐ Greater Bendigo
- ☐ Loddon
- ☐ Macedon Ranges
- ☐ Mount Alexander

Number of children aged 0-8: 24,713

Early childhood life stages and key indicators

Babies born weighing < 2500grms

7%

6%

5%

2012   2014   2016

Parental language concerns commencing school

18%

16%

14%

2010   2015

Developmentally vulnerable in 1 or more domains

20%

18%

2010   2015

This interactive Dashboard has been designed to help track, measure and continuously improve our impact. Use the LGA splitter above to see how your community is performing against these key indicators of change.
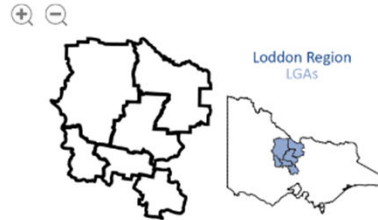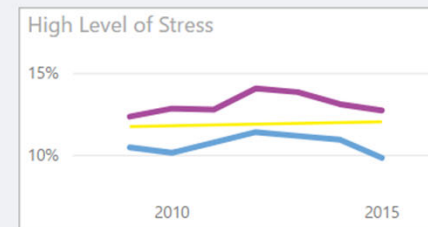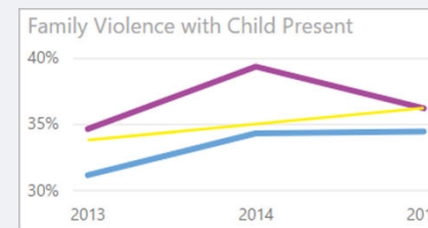
For assistance using this dashboard, contact: TBA

Kindergarten Enrolment

100%

90%

2010   2015

Attendance at 3.5 year old MCH visit

80%

70%

60%

2010   2015

Behavioural/emotional concerns

6%

4%

2010   2015

Below national minimum standard in yr 3 reading

8%

6%

4%

2012   2014   2016

Age 0

Age 3

Age 5

Age 3.5

Age 8

GROW

G21 Region Opportunities for Work

GROW is a bold and ambitious ten year collective impact strategy that aims to tackle place based disadvantage by reducing unemployment rates in target communities across the G21 region. The success of the GROW initiative is dependent upon the collective engagement and commitment of business, government, community organisations and communities across the region.

SOCIO ECONOMIC INDEX

Shows the Relative Socio-Economic Disadvantage for areas. Note: a lower score represents a higher level of disadvantage.

Data shown at SA1 level.
Source: ABS 2011

SHOW DATA

HOUSING STRESS

Proportion of population experiencing housing stress.
Data shown at SA1 level.
Source: ABS 2011

SHOW DATA

UNEMPLOYMENT RATE

Shows 'smoothed' unemployment rates.
Data shown at SA1 level.
Source: ABS 2011

SHOW DATA

PARTICIPATION RATE

Proportion of population either employed or actively looking for work.
Data shown at SA1 level.
Source: ABS 2011

SHOW DATA

JOBLESS FAMILIES

Proportion of population where no-one in the household is in paid employment.
Data shown at SA1 level.
Source: ABS 2011

SHOW DATA

INSTRUCTIONS

1. Select a GROW target area from the legend below.
2. Select a GROW key indicator from around the page to view levels of disadvantage across a targeted community.

GROW TARGET AREAS

- Colac
- Corio
- Norlane
- Whittington

GREATER GEELONG REGION

COLAC

AEDC SCHOOL READINESS

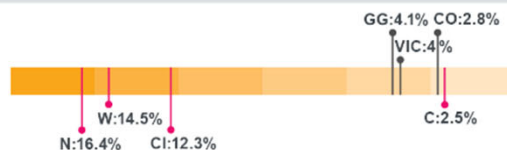Percentage of children starting school vulnerable on one or more developmental domains.
Data shown at suburb NOT SA1 level.
Source: AEDC 2009, 2012, 2015

SHOW DATA

EDUCATION ATTAINMENT

Proportion of population with Year 12 equivalent or higher education level.
Data shown at SA1 level.
Source: ABS 2011

SHOW DATA

KEY

VIC: Victoria
GG: Greater Geelong
CO: Colac Otway
C: Colac
CI: Corio
N: Norlane
W: Whittington

STATE/REGIONAL COMPARISON
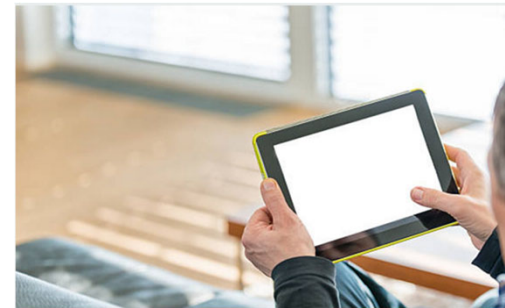
GG:4.1% CO:2.8%
VIC:4%
C:2.5%
W:14.5%
N:16.4% CI:12.3%

Scenario 1

John is a client at the therapeutic community. He is having a 3 month review with his worker, Mary.

Mary asks him to complete a survey using a tablet (i.e iPad or Surface), it takes 10 minutes.

Mary opens a dashboard on her computer and shows him instant results. He can see his results from the last session. They discuss the results.
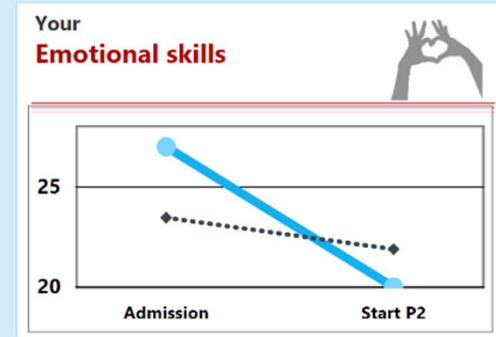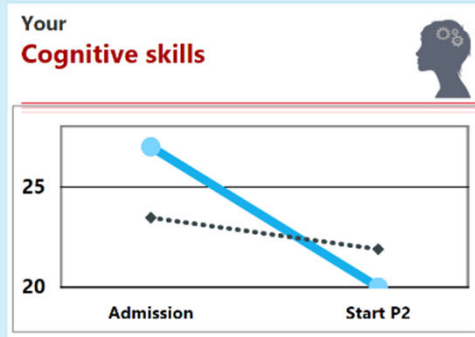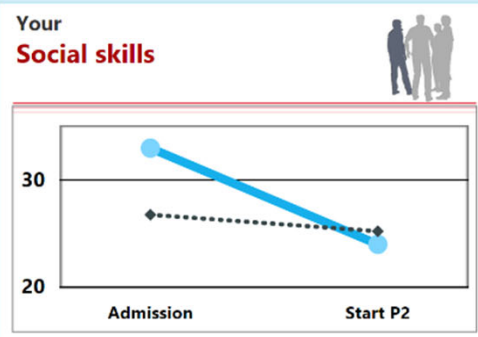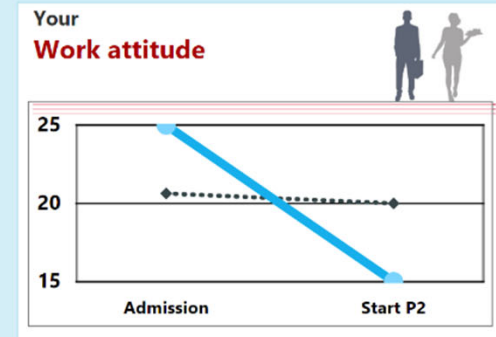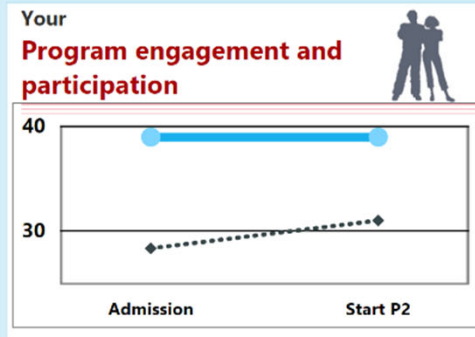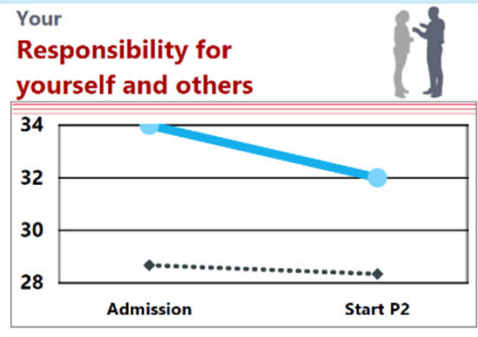
Survey results:
therapeutic community

windana
Drug & Alcohol Recovery

ID Number: 4219

I am getting the help I need: Strongly agree

Your
Responsibility for yourself and others

Your
Program engagement and participation

Your
Work attitude

Your
Social skills

Your
Cognitive skills

Your
Emotional skills

■ Show Mean Line

Scenario 2

Anne-Maree is the CEO of Windana.

Anne-Maree wants to see instantly how her organisation is tracking.

Anne-Maree opens a dashboard on her computer and views instant results.

we believe that
people can
rebuild their lives

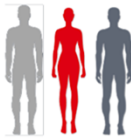and recover from the harmful effects of alcohol and other drugs.

we will demonstrate
better outcomes
for our clients' wellbeing

using the following indicators of change to track and improve our impact:

windana
Drug & Alcohol Recovery

Improved **well-being**

Increased engagement in **paid work/ education**

Improved **mental health**

Improved **quality of life**

Improved access to a **safe, stable home environment**

CONCEPT ONLY

| Intake date range period 1: | Select | to | Select | ATSI status: | Select | Gender: | Select | Age: | Select | Forensic status: | Select | Program/activity type: | Select |

% of clients satisfied or very satisfied with ability to perform daily living activities
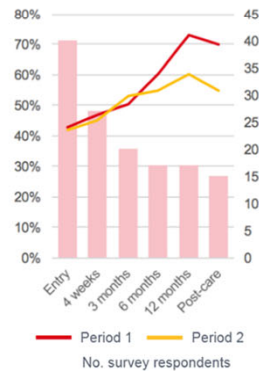
P1. Post care: 70%
P2. Post care: 55%
30% change

Period 1 — Period 2
No. survey respondents
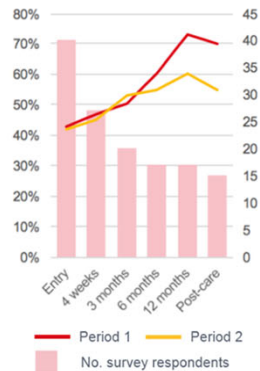
% of clients who have attended paid work or education in the past 4 weeks

P1. Post care: 70%
P2. Post care: 55%
30% change

Period 1 — Period 2
No. survey respondents

---
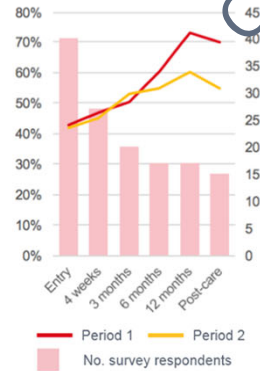
% of clients who rated themselves 7-10 on a psychological health status self-rating scale in the past 4 weeks

P1. Post care: 70%
P2. Post care: 55%
30% change

Period 1 — Period 2
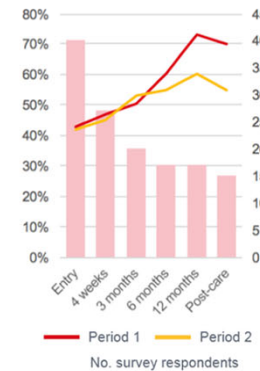No. survey respondents

---

% of clients who rated themselves 7-10 on a quality of life self-rating scale in the past 4 weeks

P1. Post care: 70%
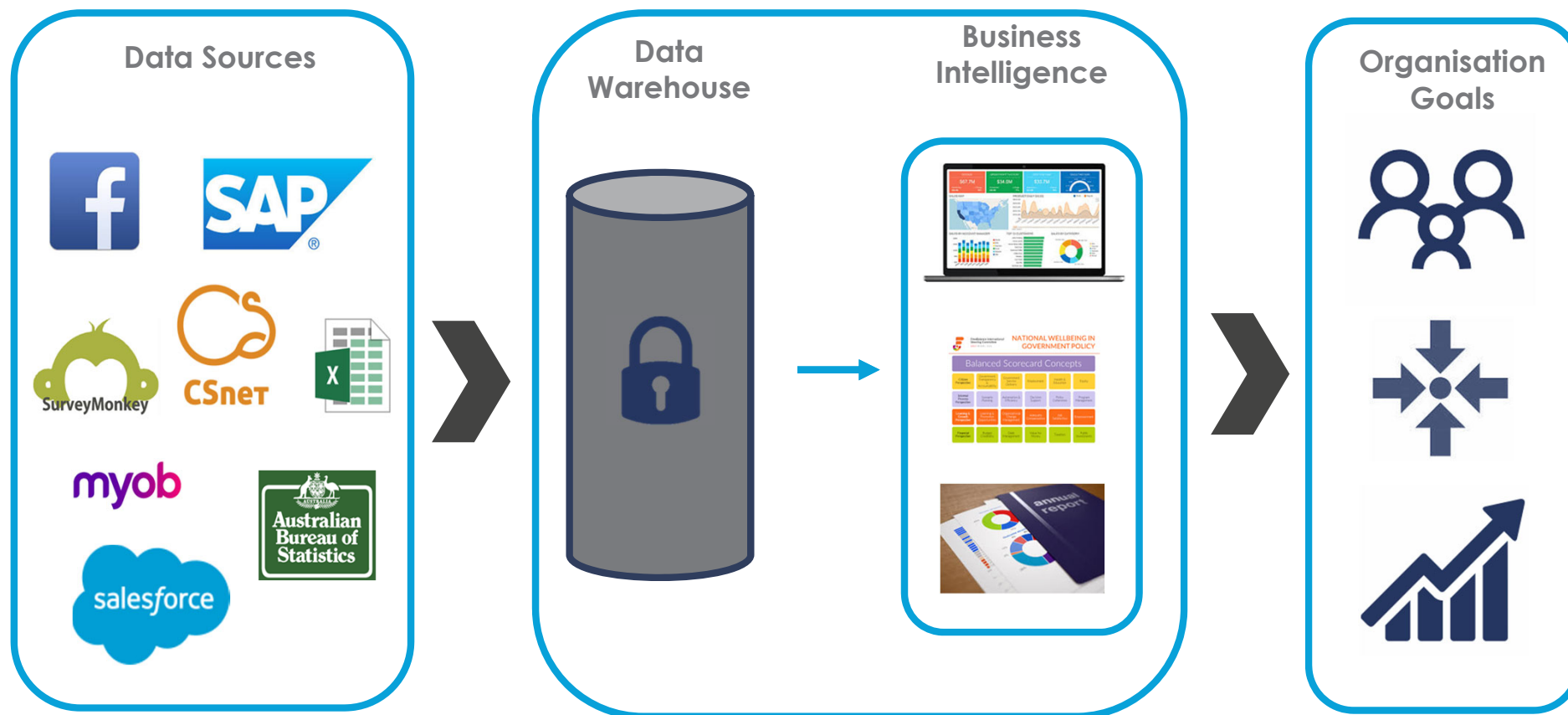P2. Post care: 55%
30% change

Period 1 — Period 2
No. survey respondents
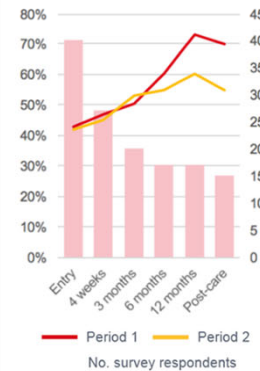
% of clients who have not been homeless or at risk of eviction in last four weeks

P1. Post care: 70%
P2. Post care: 55%
30% change

Period 1 — Period 2
No. survey respondents

Data Sources

Data Warehouse

Business Intelligence

Organisation Goals

Track2Change

If you want to know more about dashboards, contact Clear Horizon for a free live demonstration.

info@clearhorizon.com.au

What we'll cover next session

Session 3: Reflecting & learning from evaluation findings

- The role of evaluative thinking – what happened, so what, now what – in learning and reflection
- How to reflect on and apply learnings through workshops, feedback loops, sprints

If you want to dive deep into the topics today, Clear Horizon offers face-to-face training in:

- Evaluating outcomes (1 day)
- Monitoring, evaluation and learning (5 days)
- Evaluating contribution (1 day)
- Introduction to value for money (1 day)

https://www.clearhorizon.com.au/training-mentoring.aspx

What was your key takeaway from today's session?

Type a word or two on the chat.

Thanks for coming and see you next session.

Reflection