



An evaluation of the 2018 UNM Evaluation Lab Summer Institute

October 15, 2018

Sonia Bettez, Evaluation Lab Associate Director
Paige Knight, Evaluation Lab Senior Fellow

The following report is a summary of the themes and recommendations that developed as a result of the focus group activities. This feedback will help the Evaluation Lab prepare for the 2019 Summer Institute.

DRAFT

The Evaluation Lab Summer Institute

The mission of the UNM Evaluation Lab is to build evaluation capacity and to create a community of evaluation enthusiasts. The inaugural Summer Institute was designed to empower community organizations from across the state to adopt embedded, ongoing evaluation. By learning the necessary skills, organizations can conduct effective evaluations in-house. The five-day Summer Institute was held July 30-August 3, 2018 at UNM. This report highlights the themes and feedback participants gave during an interactive focus group on the last day of the Summer Institute.

On the final day, the Evaluation Lab team conducted a focus group with the 65 check participants representing 17 organizations.

Methods and Results

The focus group consisted of four interactive and reflective activities. Each activity provided responses to questions designed to elicit information from all the participants about their experience during the Summer Institute. The protocol guiding the evaluation also served as a means for providing instruction on how to conduct an interactive focus group. The protocol is provided in the Appendix.

Activity 1: Using the Gingerbread person, draw/write how you felt about evaluation before the Summer Institute, and how you felt after the Institute.

There was a dramatic change in the drawings before the institute and after the institute. Before, participants described evaluation as difficult, boring and “not for everyone.” They found it to be a “necessary evil.” Figure 1 shows the common phrases used to describe evaluation prior to the institute.

Afterwards, participants were enthusiastic and excited. They felt love and happiness and felt empowered to tackle evaluation. They found it to be more accessible and less overwhelming. Figure 2 shows the common phrases used to describe evaluation after the institute.

For example, one went from feeling overwhelmed by the difficulty of evaluation to feeling that evaluation is manageable when having the necessary tools. This was a common occurrence. Figures 3 and 4 show two examples of gingerbread drawings.

Figure 3. Gingerbread person showing ...

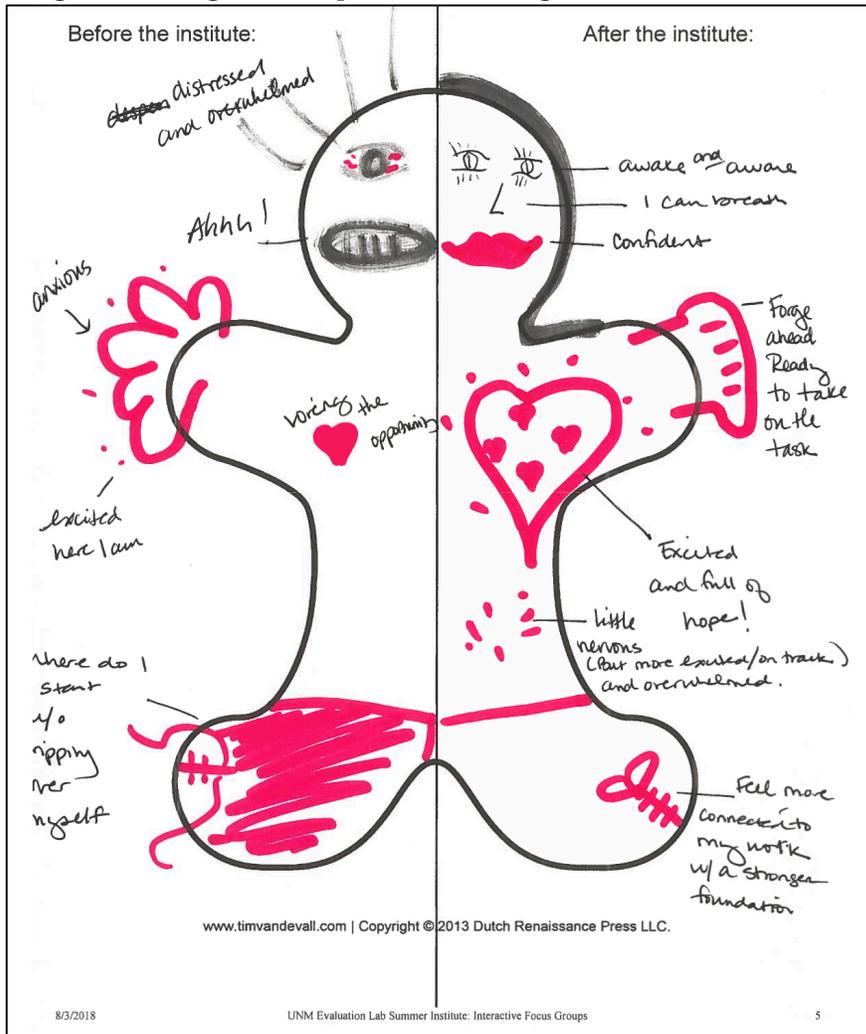
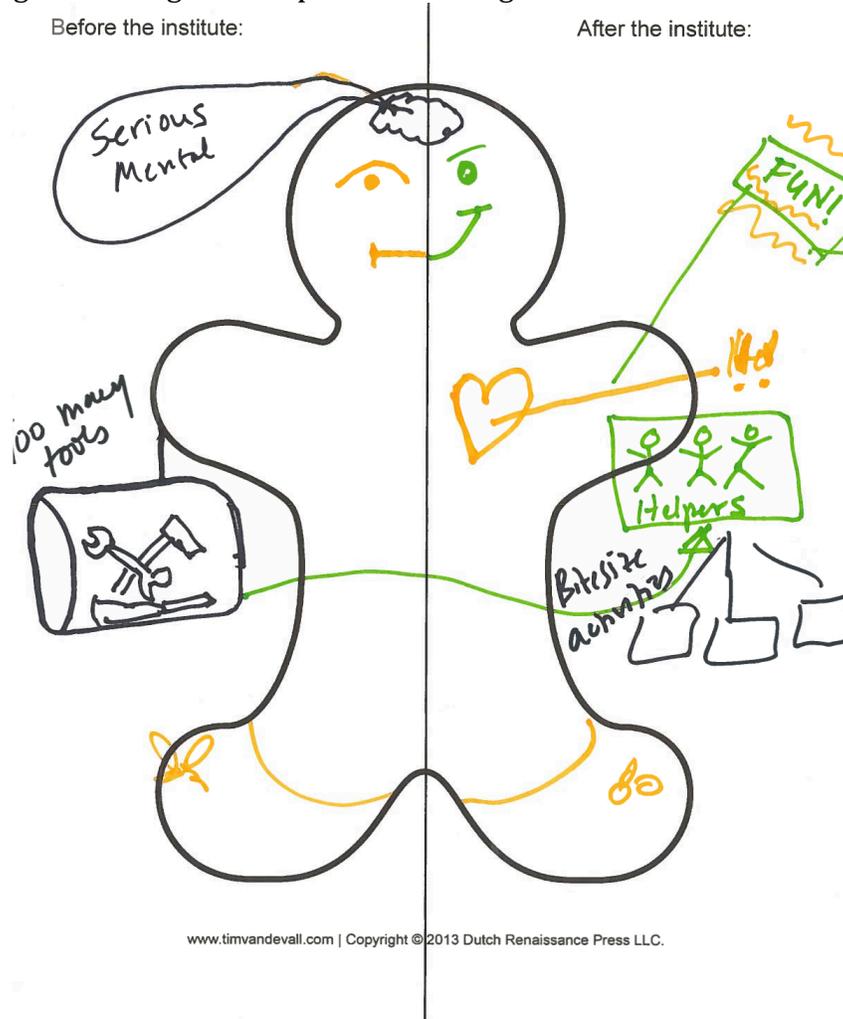


Figure 4. Gingerbread person showing . . .



Activity 2A: What evaluation techniques did you learn this week?

Participants learned about a comprehensive evaluation plan: how to organize one, structure one, design one and how to be realistic when planning an evaluation.

Logic models were a common theme for this activity. Attendees noted the in-depth instruction on logic models, how they were taught in a new and valuable way, were able to define outcomes in logic models, and the usefulness and impact of logic models as an organizational and structural tool. Rubrics - and their collective development with logic models - were also mentioned frequently as a useful tool.

Data visualization and the strategic use of graphics was an important skill learned, particularly how people respond to graphs and the different ways of interpreting data. Data skills such as t-tests in excel, data collection, and data evaluation were noted, as well as collecting qualitative data, and how to code, transcribe, and analyze it. Qualitative data collecting techniques were appreciated, such as tips, styles, process, and questions for interviews and focus groups. For several participants, qualitative evaluation was a new tool and they would like further practice and assistance to use it.

In addition to learning new skills and tools for evaluation, participants also enjoyed the chance to network and connect with others from their communities and organizations. They also enjoyed working with coworkers as a team. <This was important because it reduces conflict, everyone learns together, and everyone is on the same page as far as implementation goes. A team can also be more influential in helping the organization adopt evaluation as a regular practice. Several organizations brought large teams, and more than one team to learn and practice evaluation.

Activity 2B: What is Mission Time? How might you use it and ensure that it happens in your organization?

The answers to this question revealed that participants grasped the key elements of mission time: that it involves making dedicated time for reflection and focusing on what matters to the organization.

To ensure it happens in their organizations, participants planned to set aside time for evaluation team meetings and add mission time as a regular agenda item in staff meetings.

Mission time “is an intentional time set aside to pause from your work and look at the overall goal & mission of the organization. It is time to evaluate your process and ask how we are doing on what we want to be doing.”

Activity 3: After participating in the Institute, do you feel you can conduct an evaluation on your own? With support from the Lab? What kind of support might you need, if any?

Nearly everyone responded that they acquired the skills necessary to conduct an evaluation, some on their own and some with support. Organizations who brought one or more teams felt confident and ready to work on evaluation as soon as they returned. For some, support from their organizations was a given. Others reported that their organizations may not be ready to do evaluation yet, but they were willing to work at building support.

“Yes, I feel like the team (co-workers) that attended with me can help guide evaluation for our department's programs.

The tools provided will help as well.”

Participants reported that support through ECHO would be helpful as needed to enhance and refine skills, keep the evaluation moving, receive feedback from mentors and peers, and develop additional tools.

"I'm excited about the follow up Learning Community to be able to address real, concrete challenges."

Additional support they needed, if any, largely centered on buy-in. Participants reported the need for buy-in from leadership, stakeholders, coworkers, and/or from the overall organization to make the evaluation possible and worthwhile. Many participants mentioned they would also like mentorship especially for feedback, support, and guidance from the Evaluation Lab. Others mentioned support in the form of technical and data assistance with excel, overall analysis and time for staff to concentrate on the evaluation and mission time.

Activity 4A: What matters to your organization? What options do you have for evaluation when you return to your organization?

Many organizations reported the importance of achieving equity by consistently supporting the underserved, making a difference in the social determinants of health, and providing quality human services. Other common themes included valuing and caring for employees, creating a sense of unity in the workplace and having a positive impact on the surrounding communities.

Participants have an array of options from which to choose when they get back to their organizations from developing logic models and rubrics, to developing qualitative and quantitative evaluation activities. Participants want to continue working and learning through the ECHO Learning Community and the evaluation team. Several mentioned again the need for support and buy-in from their organizations for evaluation to be successful.

Activity 4B: How did it go? What would you change?

In general participants enjoyed the learning experience as shown by the terms they used to describe the Summer Institute: fast-paced, experiential, powerful, interactive, great delivery, interesting, game-changer, enlightening, helpful, and condensed. Participants appreciated having time to practice what they learned and liked receiving feedback from other participants and from facilitators. Participants enjoyed the learning environment created and described it as collaborative, welcoming, helpful, encouraging, open-minded, and that it allowed for self-care and creativity.

Changes were largely unrelated to the content of the course and mostly had to do with the space (too tight) and length of days (long week and more breaks

needed). Several noted how organizations need to be thoughtful about whom to send to the institute, so that the organization can benefit the most by having staff trained that can implement evaluation. Some participants would have liked more of their colleagues to attend, as well. Parking was an issue for some. It was either too far, hard to find, or they received tickets. Where feasible, the Summer Institute can implement these recommended changes for the next session in 2019.

Conclusion

The responses indicate that the Summer Institute did well in its intent to build evaluation capacity and enthusiasm for the process. Feedback from the focus group was overwhelmingly positive. Participants learned many important skills and techniques for conducting an effective evaluation and feel prepared for developing a plan when they return to work. With the Evaluation Lab's Project ECHO Learning Community, these newfound skills can be further developed and supported.

DRAFT

APPENDIX

UNM Evaluation Lab Summer Institute Focus Group Protocol

Location: Tech 140

Date: Friday, August 3 – 9:00 to 10:30 am

Evaluation Goals:

1. Participants feel positively (energized) about taking on evaluation and **agree** that evaluation is possible and meaningful.
2. Participants learn the basic process of evaluation.
3. Participants recognize grind thinking (survival mode) vs. mission thinking and are motivated into mission thinking.
4. Participants learn different options for evaluation that are within reach – not always numbers and not always just to evaluate what the funders want. Participants learn that *they* have control over **measuring** what matters to them.
5. Participants leave the institute with the confidence to conduct evaluation in their organizations with support from the Evaluation Lab through ECHO meetings.

Protocol:

9:00 Welcome – Thank everyone for joining this session. **We are going** to discuss Interactive Focus Groups. Who here has participated in an Interactive Focus Group before? Today's the day!

9:00 Activity 1 – Gingerbread People: How did you feel about evaluation before the institute, and how does it make you feel now at the summation of this week? I am going to pass around gingerbread people that are divided in two halves. On this gingerbread person, I would like you to illustrate how you felt about evaluation before the summer institute, and how it makes you feel now. You will have 5 minutes to complete the activity and then I may ask one or two volunteers to share. Note: Please describe your illustrations with words or short phrases on the side or back of the page, so I can appropriately interpret them. Example: I may draw a shoe on either foot of my gingerbread person, but before the institute, I felt like running away from evaluation and now, I feel like running towards it. [**Goal 1:** Participants feel positively about taking on evaluation.]

Add the goals this activity addresses

Uses: This activity can be used to evaluate how something makes people feel. It can also be used for people to illustrate change in their physical being. It does not need to be a before/after but can work also as a standalone activity. Additionally, with interactive focus groups, we always incorporate one or two individual activities to make sure we are hearing everyone's voice.

[Materials: PowerPoint Slide with question, Gingerbread people, markers, pens]

9:10 **Activity 2 – Speed Dating: A. What evaluation techniques did you learn this week? B. What is mission thinking? And how might you use it in your organization?** In this activity, I will ask you to partner with the person sitting next to you.

Uses: We use this activity to engage every participant in the room and allow everyone a chance to answer questions, regardless of group size or public speaking concerns. We call it “speed dating” because, when used with groups of less than 20 people, you can actually have partners rotate after answering each question.

For this activity to work, I ask that partners identify a Partner A and a Partner B. Partner A’s will speak first, while Partner B’s write their partners’ responses down on the index cards. I am passing out now. I will give Partner A’s 1 minute to complete their responses. When I call “time,” the roles will reverse, and Partner B’s will get 1 minute to speak while Partner A’s write the response on the index card. Any questions before we begin? Take a moment to decide who is Partner A and who is Partner B. Ready?

Okay, our first question is “What evaluation techniques did you learn this week?” Let’s hear from the A Partners – Partner B’s remember to write their responses! And switch! **[Goal 2: Participants learn the basic process of evaluation.]**

Please pass your index cards forward and we will move into the next question. Before we move on, does anyone want to share any of the techniques they are excited to take back to their organization?

Okay, now let’s have all the B Partners stand and find a new A Partner to sit with. It can be someone else at the same table or a new table entirely.

Has everyone found a new partner? Okay so this time the B Partners will speak first, while A Partners listen and record. Does anyone have any questions?

Our next question is “What is **mission thinking/mission time?** And how might you use it **and insure that it happens** in your organization?” B Partners have the floor. A Partners – remember to write their responses! **These are two questions: You could say: This is a two-part question**

And switch! **[Goal 3: Participants recognize grind thinking (survival mode) vs. mission thinking and are motivated into mission thinking.**

[Materials: PowerPoint Slide with the questions, two different colored index cards, pens]

Add the goals these activities address

9:30 **Activity 3 – Individual Answers:** After participating in the Institute, do you feel you can conduct an evaluation on your own? With support from the Lab? What kind of support might you need, if any? **There are three questions here: See above.** Taking a second to work individually again, I'd like you to jot down your own answer to this question on the white index card in front of you. I'm going to give you 5 minutes, so take your time. The question is "After participating in the Institute, do you feel you can conduct an evaluation on your own? With support from the Lab? What kind of support might you need, if any?" **[Goal 5:** Participants leave the institute with the confidence to conduct evaluation in their organizations with support from the Evaluation Lab.]

Uses: Again, with interactive focus groups, we always incorporate one or two individual activities to make sure we are hearing everyone's voice.

[Materials: PowerPoint Slide with the question, white index cards, pens]

Add the goals for these activities

9:35 **Activity 4 – Group Lists:** A. What matters to your organization? What are some of the different options that you have for evaluation when you return to your organization? B. How did it go? **These are 3 very different questions. I think you need to separate them. Think about coding and how it would be difficult to code when there is more than one question (Remember that was a problem with the McCune interview?** In a moment, we will reorganize to find other members of our same organizations. If you are not already sitting together, I'll ask that you relocate. There are easels dispersed throughout the room. I'd like you to come together to brainstorm amongst the group about the week. First, "What matters to your organization? What are some of the different options that you have for evaluation when you return to your organization?" We'll take 5 minutes on this question since you are probably already teeming with ideas. **[Goal 4:** Participants learn different options for evaluation that are within reach – not always numbers and not always just to evaluate what the funders want. Participants learn that *they* have control over evaluating what matters to them.]

Next, flip over to a new piece of flipchart paper and tell us "How did **the Sumer Institute** go? What did you love, what would you change, did we miss anything that you'd like to see added next year?" I will give you 5 minutes to brainstorm with your group and write your lists on the easel. Please find your organization members. Everyone ready? Okay – go. Again, these are too many questions. **You might want to prepare the flip chart in three columns with appropriate headings**

|

Uses: The “Group Lists” activity is used to get people brainstorming around a common question. This can be used for all types of questions and gets people talking in small groups.

Add the goals

[Materials: PowerPoint Slide with the question, Flip charts, markers]

9:45 Conclusion of focus group – Let’s talk about the logistics behind building an Interactive Focus Group! [Materials: PowerPoint 20 slides]

10:30 Conclusion of presentation – They engage the talkers and the listeners, they cut down your transcription time, and they are fun for you and your participants! Thank you for participating and I hope you will use the interactive activities in your own organizations. Remember to continue to use the Eval Lab as a resource. I have handouts here of the slides and of past protocols I have used that you can take and use as a reference. Thank you!

DRAFT

Before the

After the

