Session II: Rubrics +

LANL Foundation Grantees
2022 Evaluation Institute

UNM Evaluation Lab Team

February 10, 2022
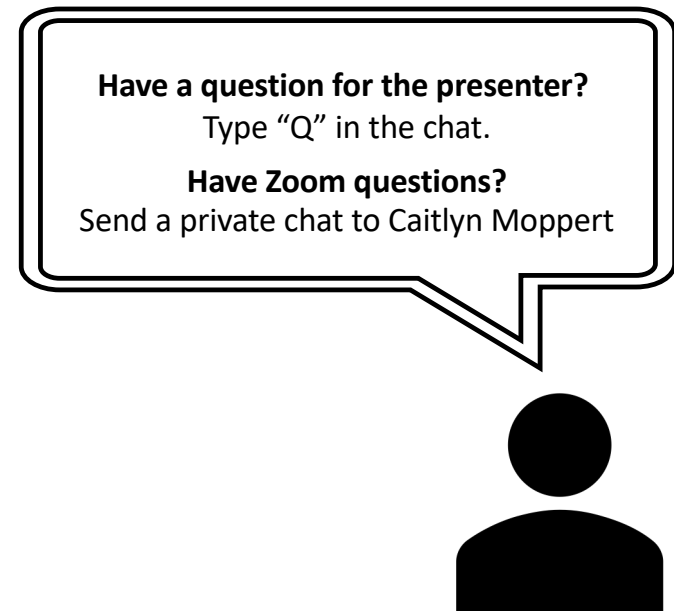
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Zoom hacks

- Please rename yourself, adding your organization
- Try speaker view – it makes Zoom less distracting

For help using Zoom

Caitlyn Moppert

Logistics

Have a question for the presenter?
Type "Q" in the chat.

Have Zoom questions?
Send a private chat to Caitlyn Moppert

Welcome Back!

Chama Valley Arts Foundation

Environmental Education of New Mexico

Española Public Schools - Healthcare Career
Pathways Project

Explora

LANL Math and Science Academy

New Mexico Immigrant Law Center

Pajarito Environmental Education Center

Peñasco ISD - Career Pathways

Pueblo of Tesuque

Questa Farmer's Market / Localogy

Santa Fe Public Schools Language and Culture
Department

Santa Fe Public Schools - Native American Student
Services

Santa Fe Outdoor
Education Collaborative, Watershed Association

SEL4NM: Social-Emotional Learning

Teach for America

Youth Works, Inc

Thank you, LANL Foundation!

The Institute

Institute Sessions 2nd Thursdays, 1:00-3:00 PM		ECHO Learning Community 3rd Tuesdays, 9:00-10:30 AM	
January 13 (1-5pm)	Institute orientation, Logic models		
February 10	Measuring what matters*	February 15	Theories of Change
March 10	Focusing the evaluation	March 15	Surveys
April 14	Data collection options	April 19	Interactive Focus Groups
May 12	Embedding	May 17	Community-Based Participatory Evaluation
June	1-on-1 Consultations	June 21	Coding
		July	BREAK
		August 16	Community Data
		September 20	Visualizing Data
October/November Time and date TBA	Presentations/graduation	October 18	Excel: Pre-Post Reporting
		November 15	Excel: Advanced Topic
*including the seemingly intangible		December	BREAK

Facilitators

Camille
Velarde

Claudia
Diaz Fuentes

Melissa
Binder

Ranjana
Damle

ECHO Learning Community Director

Charla Orozco

Evaluation Lab ECHO Online Learning Community 3rd Tuesdays, 9-10:30am

Everybody learning, everybody teaching

- You will all be added to the listserv
- Organizations share evaluation work in progress, get peer feedback
- Didactics on a variety of evaluation topics
- Sessions are recorded

https://evallab.unm.edu/learning-center/evaluation-lab-project-echo-learning-community-.html

Ongoing

Organization Mission Time:

- On your own time

- 1 ½ to 2 hours per month

Share evaluation work in ONE ECHO session

- Prep with Charla, who directs the ECHO Learning Community

Consult with facilitators in between sessions

Share your logic model!

Feb 10 – Rubrics +

1:00-1:15 PM ECHO learning community, today's work (all)

1:15-1:45 PM Logic model shares & discussions (small groups)

1:45-1:55 PM BREAK

1:55-2:10 PM RUBRICS (all)

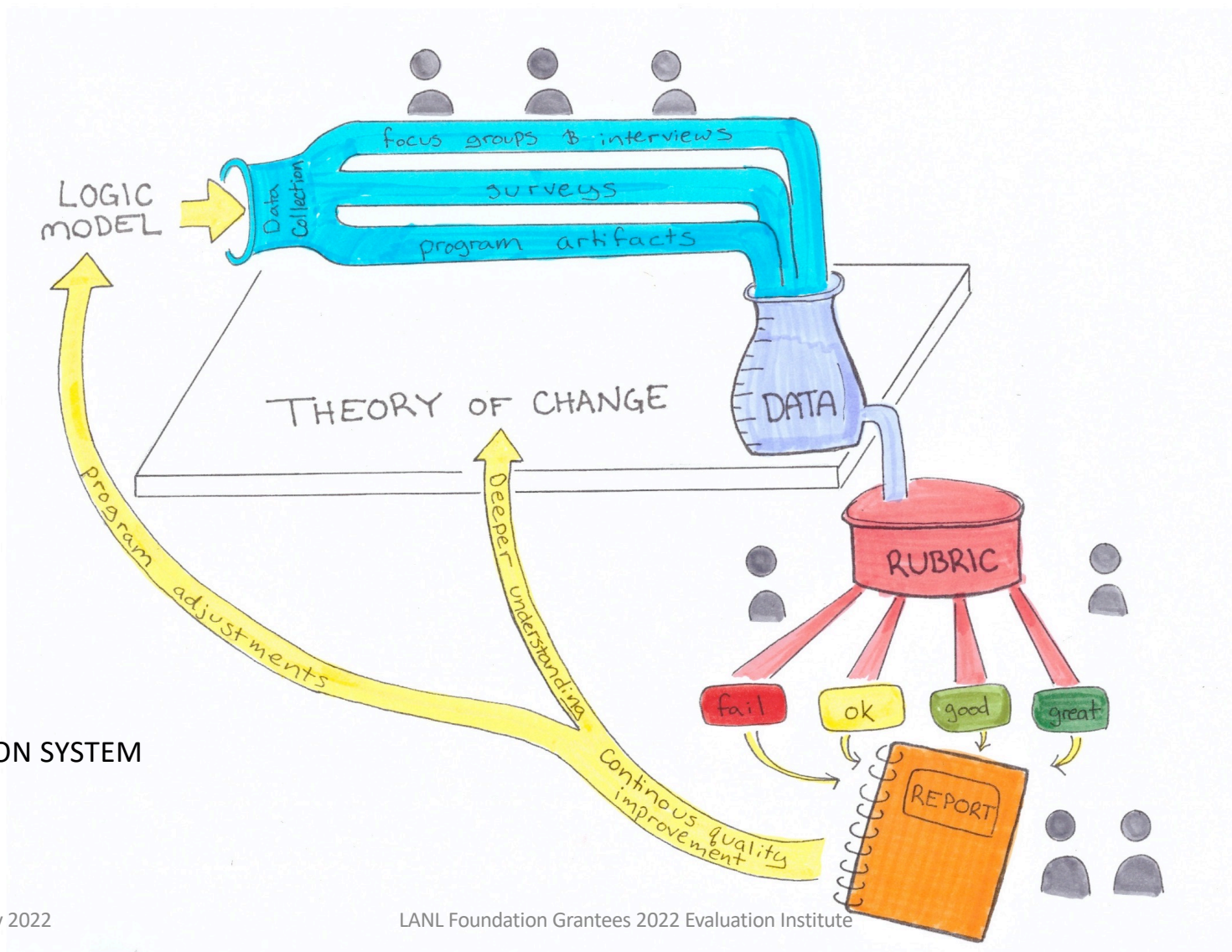2:10-2:30 PM Practice rubric (on your own)

2:30-2:50 PM Rubric questions (small groups)

2:50-3:00 PM Debrief / Survey

Blue = plenary
Purple = small groups
Green = take a break
Orange = work on your own

Questions?

Rubrics

EVALUATION SYSTEM

Rubric: Definition

"A matrix that identifies criteria for success and describes levels of performance in relation to those criteria along a spectrum from poor to excellent."

"Written descriptions of what success looks like."

* David Grant. 2015. *The Social Profit Handbook: The Essential Guide to Setting Goals, Assessing Outcomes, and Achieving Success for Mission-Driven Organizations.* (White River Junction, VT: Chelsea Green Publishing: p.45.)

## Rubric 7.7: Dodge Foundation Site Visit Rubric
Quality of Visit and Conversation

1 Poor, Unacceptable	2 Okay, Acceptable
Program officer:	Program officer:
• Conveys aura of mystery about what we do and how we do it.	• Goes to them, at their convenience, on time, with appropriate attire.
• Asks questions they have already answered in the proposal.	• Has informed conversation about the proposal and lets them know when they will hear from us.
• Lets frustrations come out when things are not going well with the organization.	• Asks if they have any questions for us.
• Takes no notes and leaves the visit with no specific information.	
• Takes a cell phone call in the middle of the visit.	
• Loses sight of grantor/grantee relationship.	

3 Our Standard: Respect for Grantees	4 Our Goal: Exceeding the Standard
Program officer:	Program officer:

Program officer:

- Places the visit in a context: The past relationship is known and valued.

- Asks the right questions of the right people; knows who does what and who thinks about what.

- Is aware of life-cycle issues; does not have the same conversation year after year.

- Is clear about the process: when things happen, how many groups are being considered, when and how grantee can still communicate with us, etc.

- Recognizes the value of grantee's time.

- Expresses appreciation for grantee's work, regardless of outcome of specific grant proposal.

- Takes notes sufficient enough to inform the write-up, but not so much as to not be fully present in the conversation. (*Wait a minute. That's great. I need to write that down.*)

- Clearly maintains the balance between the social and the professional.

- Gives even more time to groups likely to be declined, so they know they have been heard.

Program officer:

- Intervenes and significantly changes the conversation for the better by getting to important things that need to be said.

- Acts as a resource, or consultant; connects group to others in a helpful way; helps brainstorm about the future in a productive way.

- Notes impressions and body language, asks *What are they trying to convey to me?*

Why?

1. As a core practice, rubrics get everyone on the same page, with a shared idea—and specific description—of success

2. A rubric gives you a way to measure anything and everything

3. It allows you to develop what is in your circle of influence

Circle of concern

Circle of
influence
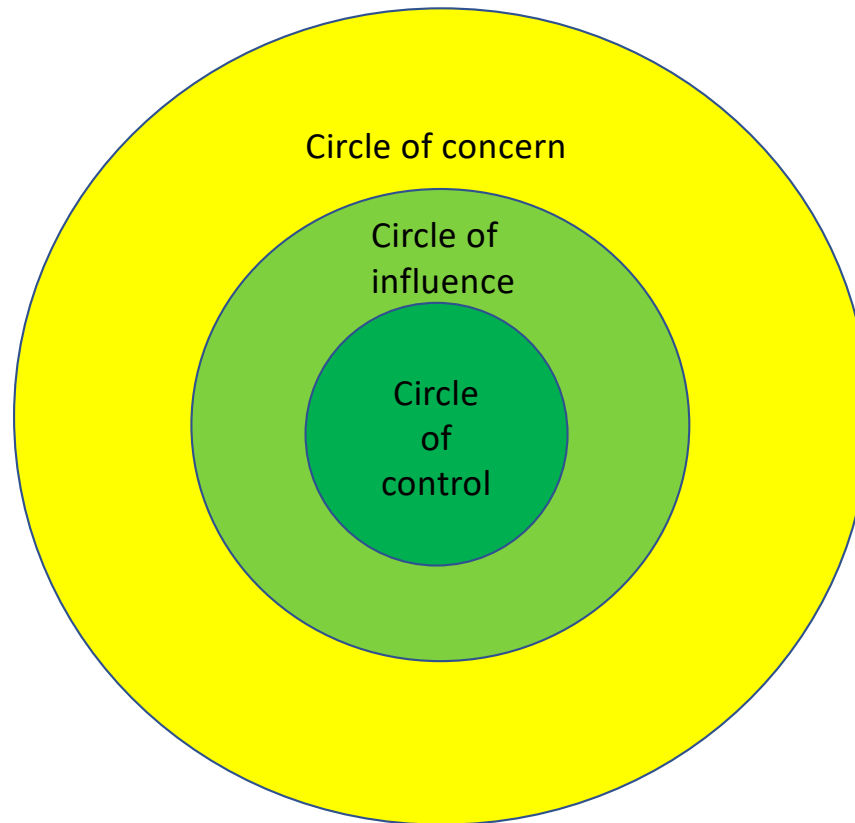
Circle
of
control

Circle of Concern concept adapted
from Steven Covey, 7 Habits of
Highly Effective People

Step 1: Choose an output or outcome or value

Heart-Centered Approach
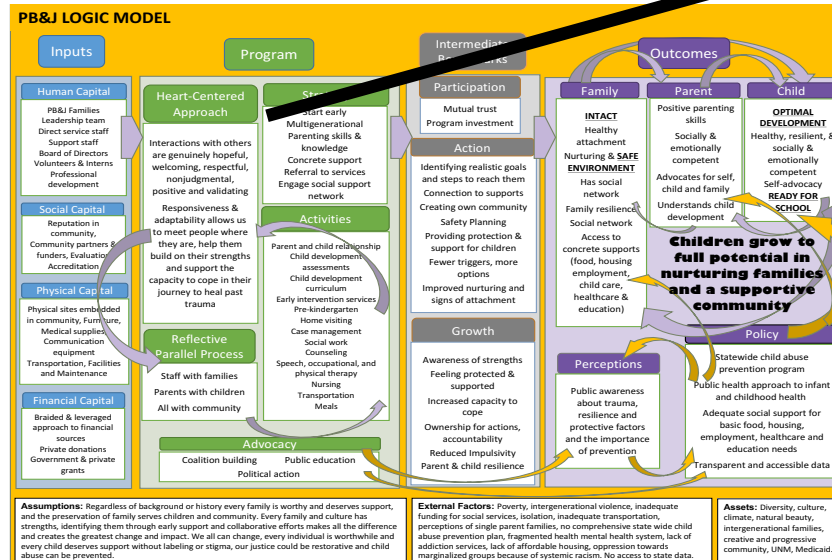
Interactions with clients are genuinely hopeful, welcoming, respectful, nonjudgmental, positive and validating

Responsiveness & adaptability allows us to meet people where they are, help them build on their strengths and support the capacity to cope in their journey to heal past trauma

Step 2: Name your levels of success

Level 1		Level 2		Level 3		Level 4
Emerging	➜	Developing	➜	Achieving	➜	Extending
Novice	➜	Apprentice	➜	Master	➜	Expert
Whack	➜	Chill	➜	Lit	➜	Fire
Failed	➜	Survived	➜	Succeeded	➜	Thrived
Below standard	➜	Developing	➜	At standard	➜	Above standard
Not happening at all	➜	Happening a little	➜	Happening pretty darn good	➜	Awesomely happening

Step 3:
Describe levels 1-3,
based on experience

- Level 1 is the worst possible scenario you have seen or worry that could happen
- Level 3 should be the best you have seen in your organization

Step 4:
Aspire!

- Level 4 is what going beyond the best you have seen
- Aspirational

Heart-Centered Approach: Non-judgment Rubric

	Weak	Developing	Achieving	Exemplary
Staff Behaviors	• Judging people by their past, treating them as if they are the same person • Refusing to work with family due to family dynamics • Educating others in a way that makes them feel stupid	• Using client's past to make assumptions about their current situation • Making some efforts to get to know the client • Educating them in a way that may lead to self-doubt	• Doesn't hold client's past against them/doesn't look at the past • Listening with empathy in an effort to get to know the client • Educating them in a way that empowers the client	• Sees client's past as a source of potential, or doesn't look at past files • Listening with empathy, holding space and making clients feel truly cared for • Educating the client in a way that helps them uncover their own strengths, thereby empowering them and building self-confidence
Staff Reactions	• Being verbal about not wanting to be in the home • Open expressions of disgust • Being condescending to others • Telling clients or staff they are terrible	• Minimum engagement • Some sympathy maybe • Makes too many excuses	• DV: No victim blaming • Open to learning • Praises efforts and hard work • Discusses failures as part of progress	• Creates a safe environment where clients can be themselves and honest • Puts aside preconceived notions of someone regarding personal appearance
Staff member says things like:	"You shouldn't have worn that today" "You chose drugs over your kids" "All drug users are the same" "I don't want to be here because you just got out of prison" "People don't change"	"Do you think it's too hot/cold for that today?" "You picked up your house some, but it still needs lots of work."	"I like what you are wearing, where did you get it?"	"You look amazing! I love how it brings out your eyes"

Using rubrics

- A rubric gives you concrete, specific descriptions for levels of success
  Use rubrics to evaluate your outputs, outcomes, values

- Level 4 gives you something to strive for.
  Once you have described it, you will begin to figure out ways to achieve it

Rubrics guide

http://evallab.unm.edu/for-organizations/lanl-foundation-grantees.html

RUBRICS

Definition: "A matrix that identifies criteria for success and describes levels of performance in relation to those criteria along a spectrum from poor to excellent."[1]

Step 1: Pick one outcome to assess.

Step 2: Choose a descriptive label for each level of achievement towards that outcome. Here are some ideas to get you started:

Level 1	Level 2	Level 3	Level 4
Emerging	Developing	Achieving	Extending
Novice	Apprentice	Master	Expert
Failed	Survived	Succeeded	Thrived
Dormant	Activated	Energized	Leader
Beginning	Acceptable	Accomplished	Stellar
Below standard	Developing	At standard	Above standard
Not happening at all	Happening a little	Happening pretty darn good	Awesomely happening
Weak	Decent	Strong	Exemplary

Step 3: Describe levels 1-3, based on what you have actually seen. Level 1 is the worst possible scenario you have seen or worry that could happen. Level 3 should be the best you have seen in your organization to date.

Step 4: Describe Level 4, which is what going beyond the best you have seen would look like. This should be aspirational.

Questions?

Try it!

Start a rubric for **ONE** outcome, output or value

2:10-2:30 PM   Practice rubric (on your own)

2:30-2:50 PM   Rubric questions (small groups)

2:50-3:00 PM   Debrief / Survey

Rubrics guide: http://evallab.unm.edu/for-organizations/lanl-foundation-grantees.html

2:50-3:00pm
What's Next / Feedback

What's next

Between now and March 10
- Org Mission Time: Work on a rubric!!!

February 15, 9:00-10:30 AM
- First ECHO Learning Community
- Theories of Change

March 10, 1:00-3:00 PM – Eval Institute #3
- Rubrics reprise
- Focusing the evaluation

Feedback

https://www.surveymonkey.com/r/7S963KW

Thank you!
See you Tuesday (at ECHO) and again on March 10!