

Day 2:

Measuring what matters

Defining Success through Rubrics

UNM Evaluation Lab
2025 Summer Institute

3 June 2025



Before diving into the topic of rubrics...

- Evaluation on its own \neq mission driven organizations.
- Rubrics fit into evaluation as part of the larger picture of **formative assessment**
 - “assessment practices whose purpose is to improve practices, rather than judge them” SPH. Pg. 19

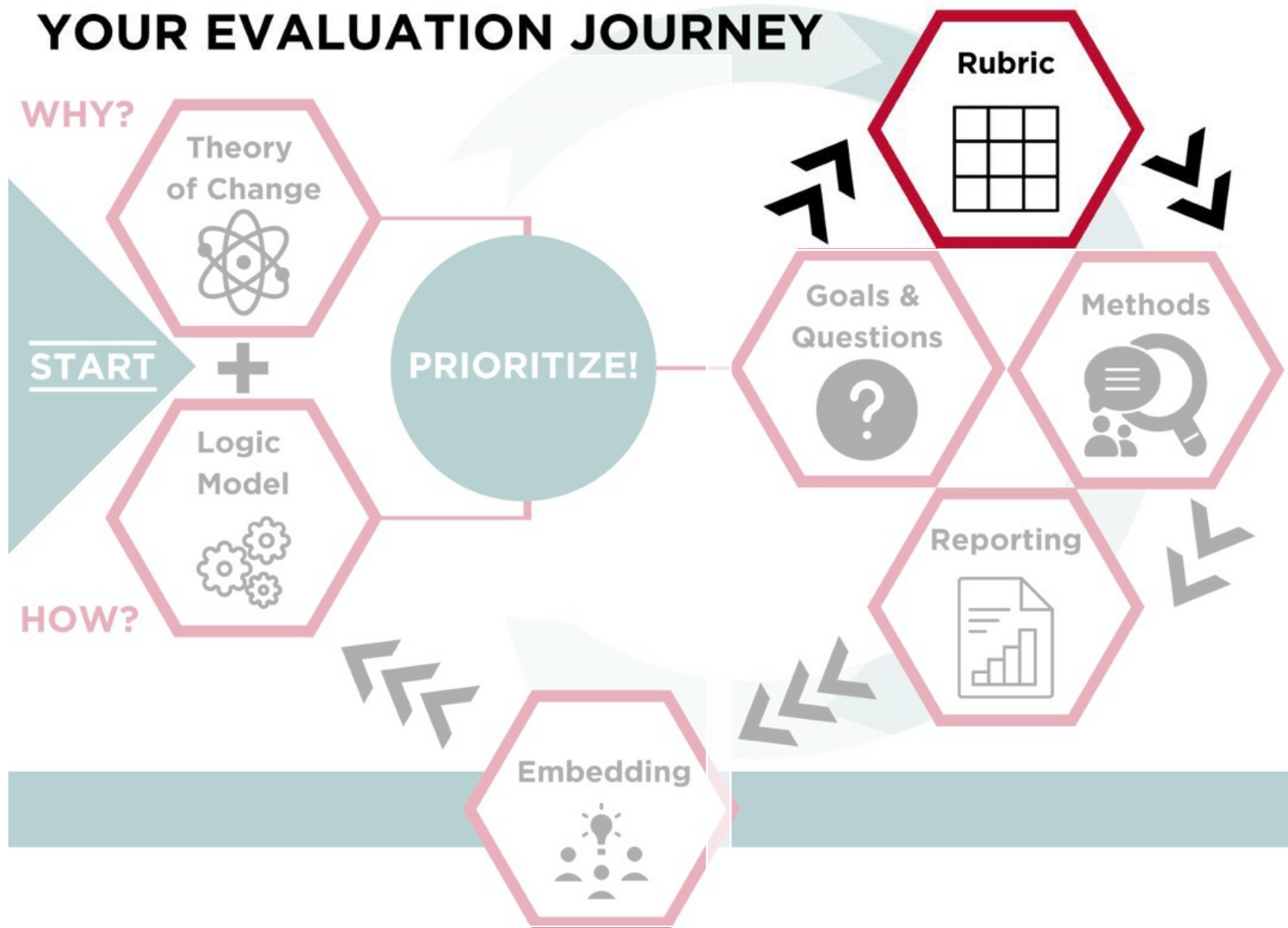
How do logic models and rubrics fit together in a formative assessment practice?

What are rubrics?

- “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.

YOUR EVALUATION JOURNEY



Rubrics help your organization **build consensus on the definition of success.**

You can use them for outputs and outcomes.

Rubrics are useful to define outputs and outcomes, especially those hard to measure - Examples

OUTPUTS

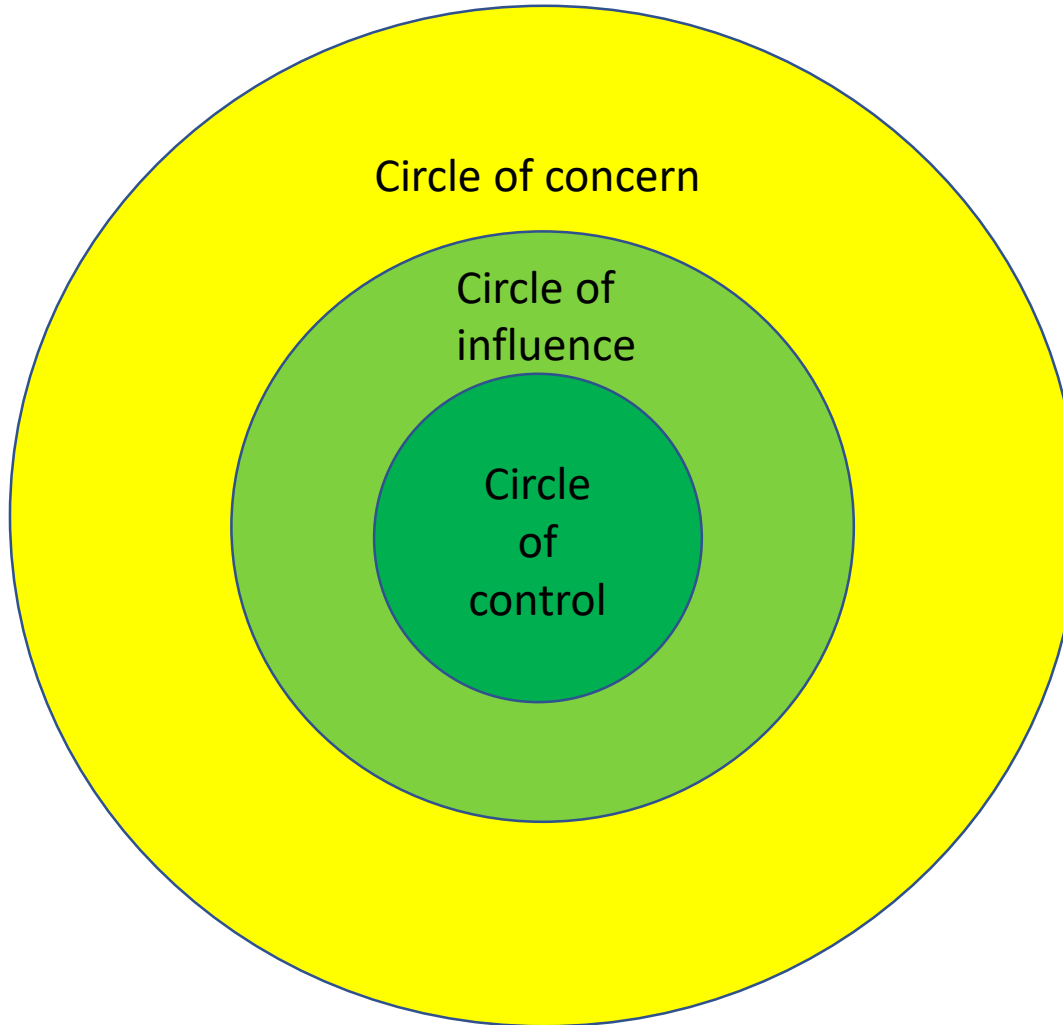
- Quality of interactions between staff and participants
- Welcoming environment
- Developing trust
- Sense of safety

OUTCOMES

- Client self-agency
- Emotional self-regulation
- Healthy parent-child relationship
- Cultural representation in product/service

Why?

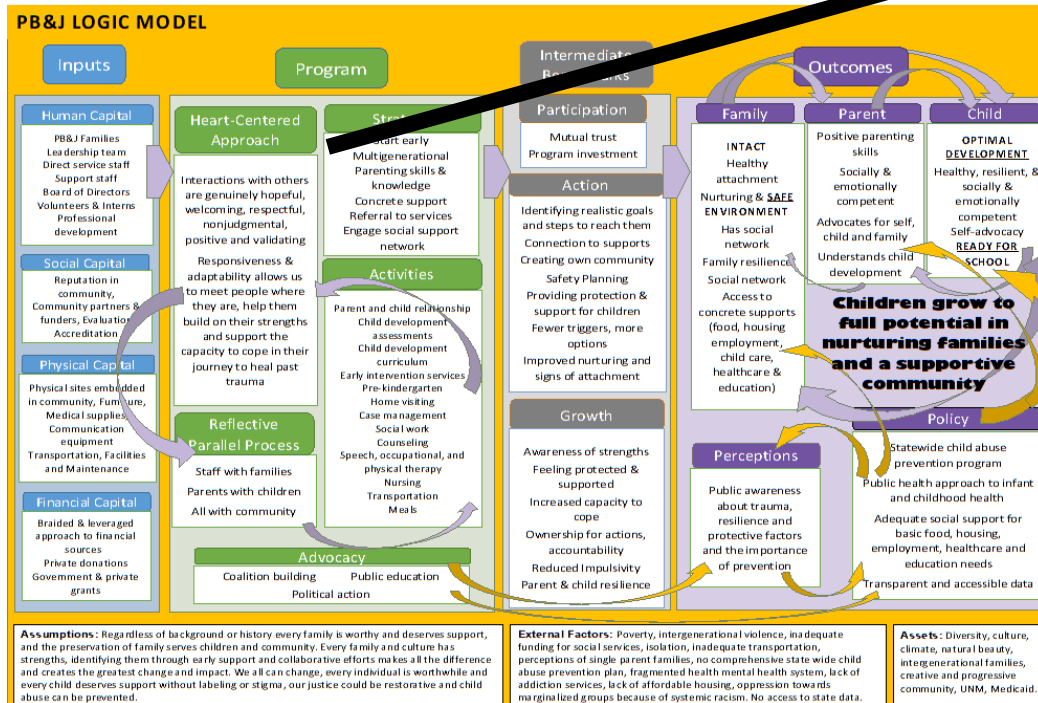
- As a core practice, rubrics get everyone on the same page, with a shared idea—and specific description—of success
- A rubric gives you a tool to begin prioritizing to measure what matters to your organization.
- It allows you to develop what is in your circle of influence



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
- (Tip: start with level 3 and 1, then 2)

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	<ul style="list-style-type: none"><input type="checkbox"/> Judging people by their past, treating them as if they are the same person<input type="checkbox"/> Refusing to work with family due to family dynamics<input type="checkbox"/> Educating others in a way that makes them feel stupid	<ul style="list-style-type: none"><input type="checkbox"/> Using client's past to make assumptions about their current situation<input type="checkbox"/> Making some efforts to get to know the client<input type="checkbox"/> Educating them in a way that may lead to self-doubt	<ul style="list-style-type: none"><input type="checkbox"/> Doesn't hold client's past against them/doesn't look at the past<input type="checkbox"/> Listening with empathy in an effort to get to know the client<input type="checkbox"/> Educating them in a way that empowers the client	<ul style="list-style-type: none"><input type="checkbox"/> Sees client's past as a source of potential, or doesn't look at past files<input type="checkbox"/> Listening with empathy, holding space and making clients feel truly cared for<input type="checkbox"/> Educating the client in a way that helps them uncover their own strengths, thereby empowering them and building self-confidence

In short: Using rubrics for evaluation will:

- Give you concrete, **specific descriptions** for levels of success
Use rubrics to evaluate your outputs, outcomes, values
- Provide the **context** to give and receive **feedback**.
- **Frame evaluation** as a function of our organizational priorities, not the evaluation tools.
- Be an archive or record of what matters to our organizations. We can come back to them to **guide our Mission Time**.
- Describe your aspirational level of success. Level 4 gives you **something to strive for**.
Once you have described it, you will begin to figure out ways to achieve it

Questions?

Rubrics guide



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.

Additional Rubric Example

David Grant, the author of the Social Profit Handbook, served as director of the Dodge Foundation in New Jersey for several years.

The organization identified site Program Officers' visits to partners as one of the most important components of their evaluation process. The rubric contains their four levels of success for these visits.

The Social Profit Handbook

Rubric 7.7: Dodge Foundation Site Visit Rubric

Quality of Visit and Conversation

1 Poor, Unacceptable	2 Okay, Acceptable
<p>Program officer:</p> <ul style="list-style-type: none">• Conveys aura of mystery about what we do and how we do it.• Asks questions they have already answered in the proposal.• Lets frustrations come out when things are not going well with the organization.• 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.	<p>Program officer:</p> <ul style="list-style-type: none">• Goes to them, at their convenience, on time, with appropriate attire.• Has informed conversation about the proposal and lets them know when they will hear from us.• Asks if they have any questions for us.

The Social Profit Handbook

Rubric 7.7: Dodge Foundation Site Visit Rubric

Quality of Visit and Conversation, continued

<p>3</p> <p>Our Standard: Respect for Grantees</p>	<p>4</p> <p>Our Goal: Exceeding the Standard</p>
<p>Program officer:</p> <ul style="list-style-type: none"> • 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 write-up, but not so much as to not be fully present in the conversation (<i>Wait a minute. That's great. I need to write that down.</i>) • 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. 	<p>Program officer:</p> <ul style="list-style-type: none"> • Intervenes and significantly changes the conversations for the better by getting to the important things that need to be said. • Acts as a resource, or consultant: connects groups to others in a helpful way; helps brainstorm about the future in a productive way. • Notes impressions and body language, asks <i>What are they trying to convey to me?</i>