Information and Orientation Guide

2022 EDITION

LABOEVAL

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INTRODUCTION

Community-based organizations (CBOs) provide vital services in their communities. An increasing number of CBOs seek to use evaluation results to measure progress, learn, reflect, and make informed choices. However, studies have shown that CBOs often face challenges during the evaluation process due to organizational constraints. Such challenges include limited budgets, high staff turnover, lack of knowledge and skills, and limited access to methodological support during evaluations.

ABOUT LABOEVAL

The Social Innovation Laboratory for Evaluation in Non-Profit Organizations (LaboEval) is an applied research project that seeks to identify and document the most promising strategies for strengthening evaluation capacity in community organizations. To this end, the LaboEval team offers training and coaching to support participating organizations in their evaluation efforts.

Since 2019, the project has provided 18 community-based organizations with training and support to build their capacity to do and use evaluation. Information about the participating organizations' evaluation projects is available on the following website: www.evalcap.ca. Simultaneously, case studies conducted by our team on the experiences of participating organizations allow the research team to generate new scientific knowledge about factors and strategies that influence evaluation capacity in the community sector.

LaboEval is funded by the Social Sciences and Humanities Research Council of Canada and the Centre for Research on Educational and Community Services at the University of Ottawa. It is under the supervision of Dr. Isabelle Bourgeois, Associate Professor at the Faculty of Education, University of Ottawa. This research has received ethics approval from the University of Ottawa Ethics Committee (S-09-19-4904).

Conseil de recherches en sciences humaines du Canada

Social Sciences and Humanities Research Council of Canada

Canada

ELIGIBLE ORGANIZATIONS

Organizations are eligible if they are:
- Not-for-profit related to health and social care, housing, education, policing, and other issues.
- Located in Canada

OUR APPROACH

LaboEval is inspired mainly by the Practical Participatory Evaluation (P-PE) approach to evaluation (Cousins & Earl, 1995). P-PE seeks the active participation of stakeholders in the evaluation process. P-PE believes involving stakeholders in the evaluation process will increase evaluation use and process ownership.

OUR CAPACITY-BUILDING PROCESS

LaboEval's evaluation capacity-building process is composed of four phases described in detail below:

1- NEEDS ASSESSMENT

- First, a team member of LaboEval will conduct a needs assessment to collect information on your organizational context, and on which aspects of evaluation capacity might be most beneficial to develop.
- The needs assessment is conducted through a semi-structured interview, approximately 30 minutes, and a document review.

2- PLANNING THE EVALUATION

- In the second phase, you will be invited to complete online training modules to help you plan an evaluation. The training includes materials and tools to guide you through the steps of planning your evaluation. The training content is described in our training plan located in Appendix A. Planning the evaluation requires 5 to 8 hours of work depending on its scope and scale.
- An evaluation specialist will follow up with you throughout the planning phase to provide relevant feedback tailored to your context and needs.

3- CONDUCTING THE EVALUATION

- In the third phase, you will implement the evaluation using your evaluation plan. Evaluation implementation typically takes between 2 and 5 months. Several strategies will be used to support you throughout this period: telephone or videoconference consultation, ongoing training activities, and follow-up emails. A student paid out of LaboEval funds may also carry out tasks related to the evaluation or your capacity-building efforts.

4- USING AND SHARING results

- In the fourth and final phase, you will be asked to share your results, reflect on the outcomes, and discuss the next steps with your

stakeholders. Materials and tools will be provided to ensure the use and dissemination of your findings.

- Different avenues will be offered to participants who complete the training and wish to pursue evaluation capacity-building efforts with the help of our team.

MUTUAL COMMITMENT AGREEMENT

LaboEval's services are free to non-profit organizations. Participants who agree to participate in LaboEval's services must therefore commit to investing the required resources and time to carry out and complete the project on time. In addition, participants will be asked to contribute to LaboEval's research activities, which are intended to advance knowledge on evaluation capacity building in the community sector. The table below summarizes the resources and time required to complete the training.

Support Phase	Your Contribution
1- Needs assessment	▪ Read and sign the informed consent document ▪ Participate in a needs assessment interview of 30 minutes ▪ Complete an organizational evaluation capacity measurement tool ▪ Inform and engage stakeholders in the project
2- Planning the evaluation	▪ Participate in the training by completing the proposed activities ▪ Participate in a follow-up interview on your progress in the training
3- Conducting the evaluation	▪ Carry out the evaluation project using the evaluation plan
4- Using and Sharing Results	▪ Disseminate evaluation results within your organization ▪ Participate in research activities led by LaboEval

OUR RESEARCH TEAM

Isabelle Bourgeois, Ph.D.

Isabelle Bourgeois is an Associate Professor in the Faculty of Education at the University of Ottawa. Her current research activities focus on organizational capacity building in evaluation and the use of evaluation in education, public administration, public health and the community sector.

David Buetti, Ph.D.

David Buetti is the Research Associate at LaboEval. His work among community organizations. Over the last nine years, Dr. Buetti has worked on multiple evaluations and applied research projects involving various stakeholders, such as policymakers, health practitioners, and NGOs.

APPENDIX A - LABOEVAL TRAINING PLAN

- Our training plan focuses on experiential learning, which seeks to foster links between theory and practice by encouraging organizational participants to apply their new knowledge as part of learning activities.
- It consists of seven online training modules **(approximately 2 hours per module)** with complementary activities to be completed by the organization with the help of a trainer if necessary.

MODULES	TARGETED LEARNING OBJECTIVES	LEARNING STRATEGIES AND ACTIVITIES	SUPPLEMENTARY MATERIALS
1. LEARN ABOUT EVALUATIONS	I. Define evaluation and distinguish it from anecdotal evidence, performance assessment and accountability II. Identify different forms of evaluation use III. Understand the role and importance of stakeholders in evaluation processes IV. Select the evaluation focus and identify promising ways to engage stakeholders	a. Video clips - What is an evaluation? - Why and what to evaluate? - With whom and when to evaluate? b. Hands-on workshop to identify the purpose of evaluation and stakeholders, as well as promising ways to engage them in the process c. Module 1 Learning Objectives Quiz d. Module 1 Discussion Forum e. Further Reading and Resources	- Animated video on evaluation to educate and inform stakeholders about evaluations
2. AGREE ON THE EVALUAND	I. Understand the utility of theories of change in evaluation II. Develop a theory of change with stakeholders	a. Video clips - Tracing the desired change - A theory of change: why and how? - Answers to common questions about the theory of change - Validating your theory of change with others b. Hands-on workshop to design a draft theory of change with the team c. Quiz on the learning objectives of Module 2 d. Module 2 discussion forum e. Further reading and resources	- Animated video to explain the theory of change to stakeholders - A practical guide and materials for validating your theory of change with stakeholders

3. DESIGN THE EVALUATION PLAN	I. Distinguish the steps in the evaluation process
	II. Become familiar with the main elements of an evaluation plan
	III. Design an evaluation plan with stakeholders
		a. Video clips
		  - Four steps to evaluations
		  - Designing a solid evaluation plan in 5 steps
		  - Choose your evaluation questions
		  - Choose your evaluation indicators
		  - Choose your information sources and methods
		  - Validating your evaluation plan with others
		b. Hands-on workshop to design a realistic evaluation matrix
		c. Quiz on the learning objectives of Module 3
		d. Module 3 discussion forum
		e. Further reading and resources
			- A practical guide and materials for validating the evaluation plan with stakeholders

4. CONDUCTING THE EVALUATION	I. Design reliable data collection tools
	II. Resolve ethical issues arising from the evaluation process
	III. Effectively plan evaluation tasks and timelines
		a. Video clips
		  - Conducting the assessment
		  - Identifying and resolving ethical issues
		  - Designing a useful survey
		  - Preparing and facilitating a focus group
		  - Preparing and conducting a one-on-one interview
		  - Other useful collection tools
		  - Organize data collection activities effectively
		b. Hands-on workshop to effectively plan the list of data collection tasks and timelines
		c. Module 4 Learning Objectives Quiz
		d. Module 4 Discussion Forum
		e. Further Reading and Resources
			- Templates and examples of data collection tools that can be used by participants

5. ANALYZE THE INFORMATION	I. Distinguish between the types of data resulting from the evaluation
	II. Analyze and interpret the evaluation data
	III. Plan a meeting to interpret the preliminary evaluation results
		a. Video clips
		  - Distinguishing between types of data before analyzing them
		  - Quantitative data analysis techniques
		  - Qualitative data analysis techniques
			- A practical guide and materials to facilitate interpretation of preliminary evaluation results

		- Collective interpretation of data: why and how? b. Quiz on the learning objectives of Module 5 c. Hands-on workshop to plan a meeting for interpretation of evaluation data d. Module 5 Discussion Forum e. Further Reading and Resources	
6. SHARE EVALUATION RESULTS AND LESSONS LEARNED	I. Identify effective tools to share evaluation results and lessons learned II. Select and design tools to effectively disseminate evaluation results and lessons learned	a. Video clips - Why and how to share evaluation results - Producing a useful evaluation report - Producing an effective evaluation report - Making a successful evaluation presentation - Creating an impactful infographic or poster b. Practical workshop to develop an effective action and communication plan c. Module 6 Learning Objectives Quiz d. Module 6 Discussion Forum e. Further Reading and Resources	- Templates and examples of communication tools that can be used by participants
7. TOWARDS BUILDING OUR EVALUATION CAPACITY	I. Recognize the importance of building evaluation capacity II. Identify promising strategies for building evaluation capacity in the organization	a. Video clips - Introduction to evaluation competencies - Common barriers to evaluation - Key ingredients for building evaluation capacity - Ideas to build evaluation capacity in your organization b. Quiz on the learning objectives for Module 7 c. Hands-on workshop to develop and plan an evaluation capacity building strategy with stakeholders d. Module 7 discussion forum	- Short explanatory video on evaluation capacity for stakeholders - Facilitation guide for structuring a discussion on evaluation capacity building strengths and needs