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# MAKING EVALUATION MEANINGFUL

BUILDING CAPACITY FOR COMMUNITY-BASED  
EVALUATION IN TIMES OF DISRUPTION

APRIL 1, 2020  
1:00 - 2:15 PM EST



CENTRE FOR  
COMMUNITY  
BASED RESEARCH

# WORKSHOP PURPOSE

To explore how service-provider organizations (SPOs) can build their internal community-based evaluation capacity in ways that make evaluation meaningful to them, including in times of disruption.

# AGENDA



**OVERVIEW**  
COMMUNITY-BASED EVALUATION FOR  
DISRUPTIVE TIMES

RICH JANZEN



**POLICY**  
FEDERAL INITIATIVES IN  
SUPPORT OF SPOS

DAVID KURFURST



**ACADEMIC**  
ACADEMICS IN SUPPORT OF  
EVALUATION

LEAH HAMILTON



**SPO**  
BUILDING A CULTURE OF  
EVALUATION

NABIHA ATALLAH

# OVERVIEW

## COMMUNITY-BASED EVALUATION



# CENTRE FOR COMMUNITY BASED RESEARCH

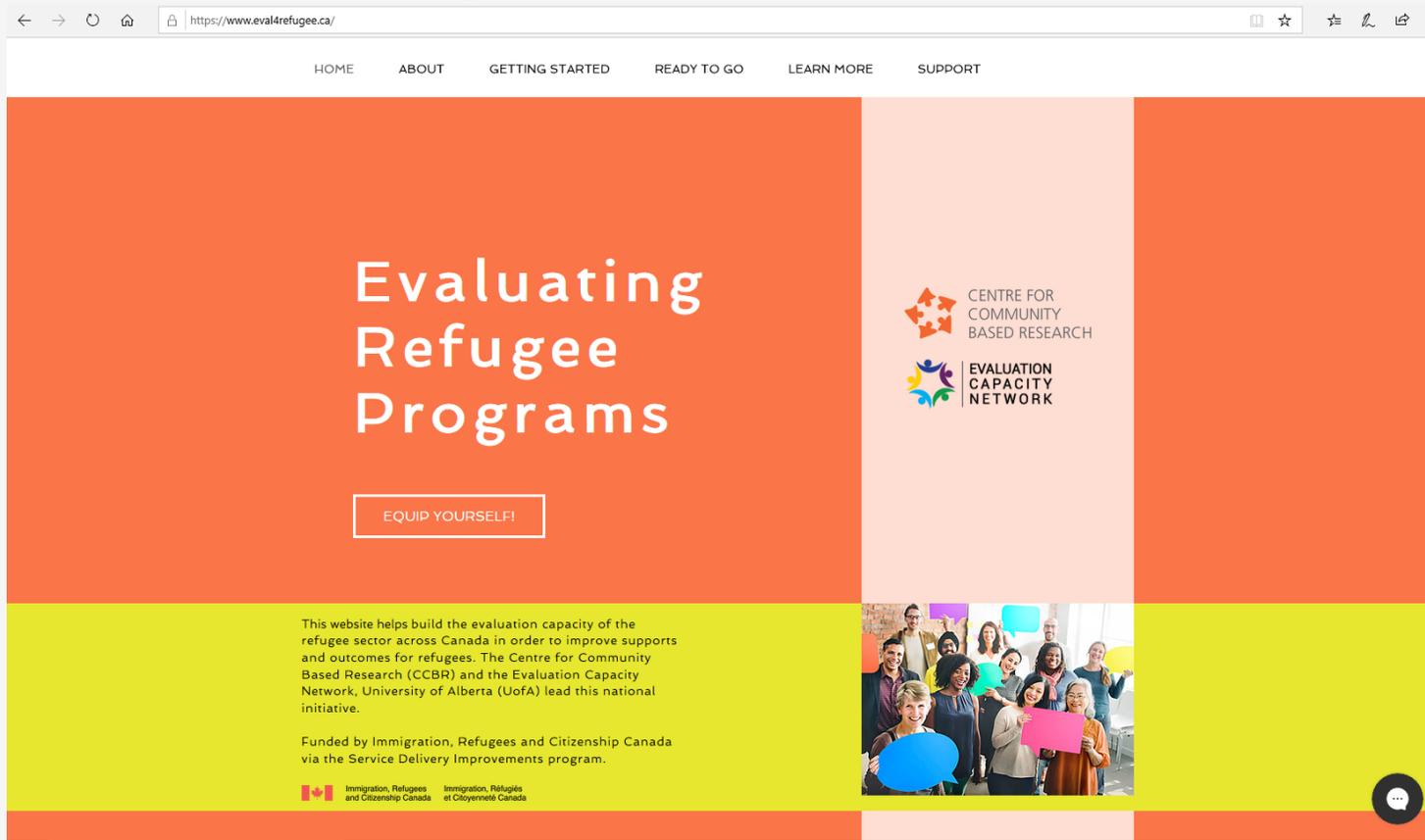
- Non-profit organization on the University of Waterloo campus
- Balancing academic excellence with community relevance since 1982
- 400+ projects on a range of societal issues
- Social enterprise eligible for academic funding



CENTRE FOR  
COMMUNITY  
BASED RESEARCH

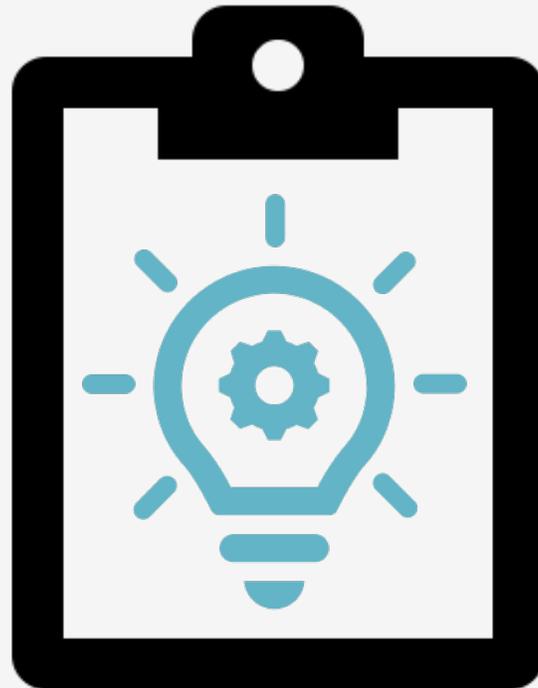
# A NATIONAL PROJECT

[www.eval4refugee.ca](https://www.eval4refugee.ca)



# EVALUATION

- Is an organized approach to collecting information (about activities and impacts) that assesses the accomplishments and effectiveness of a program (or organization) and helps to improve it.



# THE DRIVERS OF EVALUATION

## REACTIVE

- In response to funder accountability

## PROACTIVE

- For healthy organizational development
- For adaptive management in response to shifting contexts

## MEANINGFUL EVALUATION

- Not only **does** evaluation
- But also **uses** evaluation results



# EVALUATION IN DISRUPTIVE TIMES

## STRATEGIC LEARNING

- Keeping focused on strategic directions
- Providing opportunity for reflective practice

## ADAPTIVE MANAGEMENT

- Real-time evidence to guide decision-makers
- Usefulness in stimulating innovation

## MEANINGFUL EVALUATION

- Helps organizations to adapt to the current context
- Keeps organizations focused on their strategic mission



# COMMON COVID-19 ADAPTATIONS

## EVALUATION FOCUS

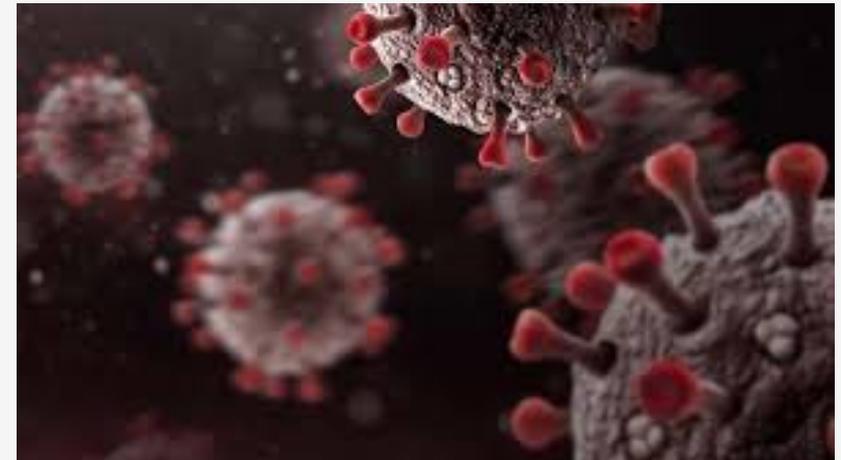
- Learnings about how pandemic impacts service delivery
- Learnings about how pandemic impacts intended outcomes

## EVALUATION IMPLEMENTATION

- Remote information gathering
- Remote ethical considerations

## EVALUATION USE

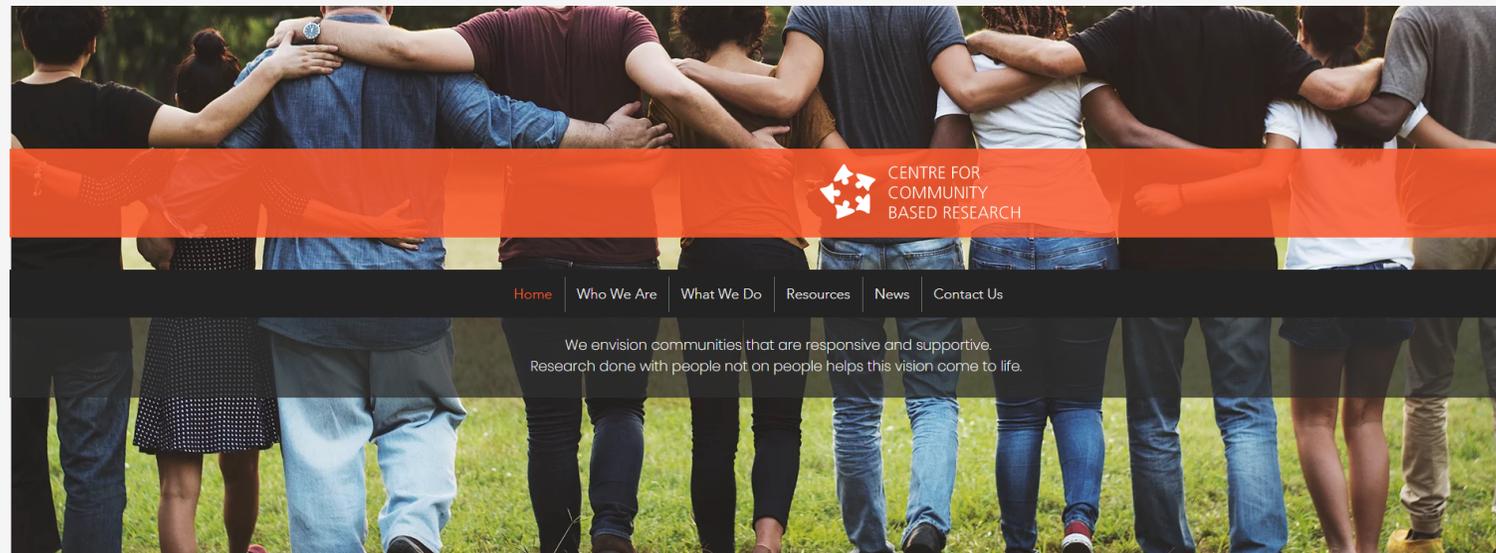
- Remote knowledge mobilization strategies
- Clarify what program adaptations can be carried forward beyond the pandemic



# A COMMUNITY-BASED APPROACH

**Main Workshop Message:** A community-based approach to evaluation will help evaluation be meaningful even (especially?) in disruptive and uncertain times.

- How is community-based evaluation different from other approaches to evaluation?

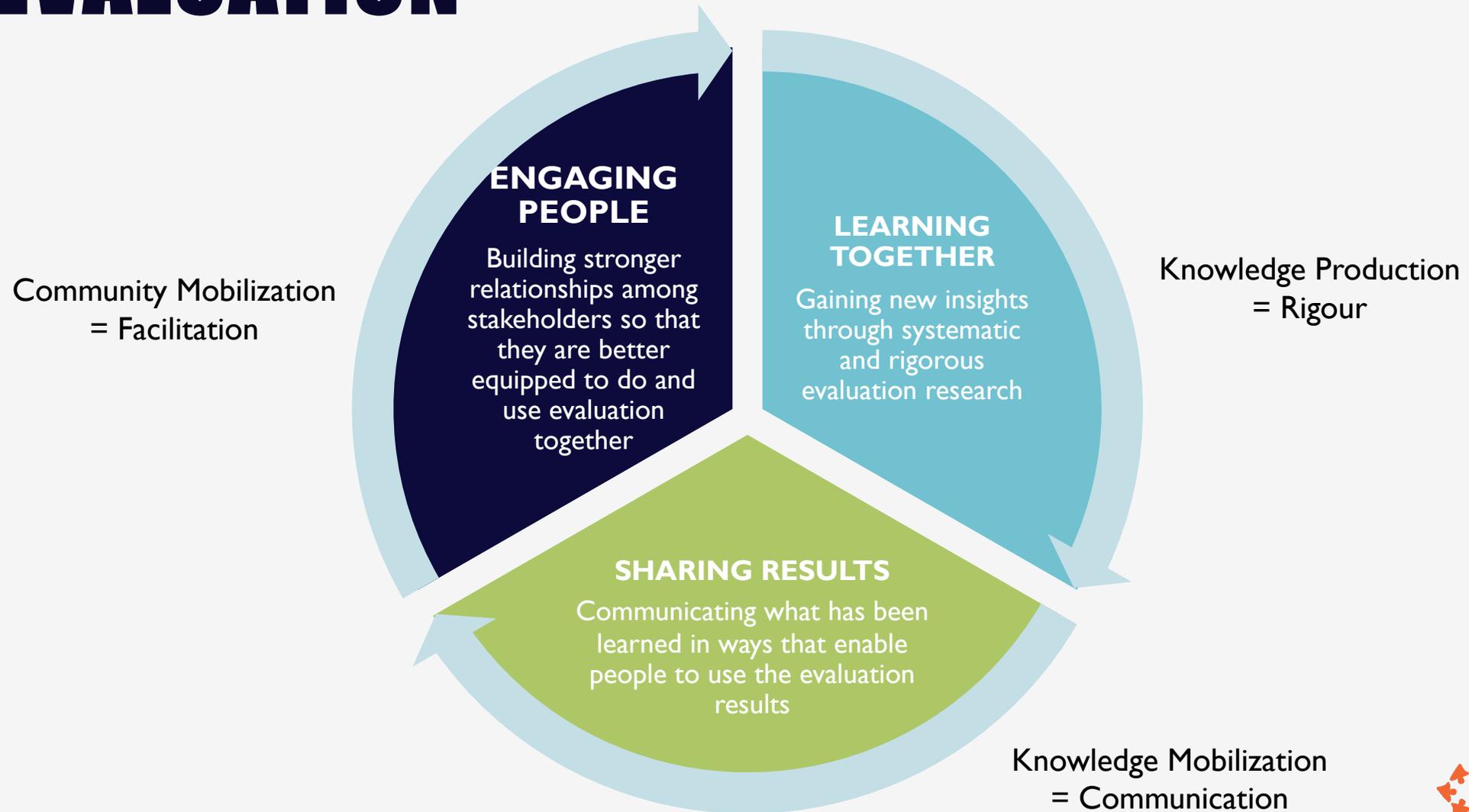


# THREE HALLMARKS OF COMMUNITY-BASED EVALUATION

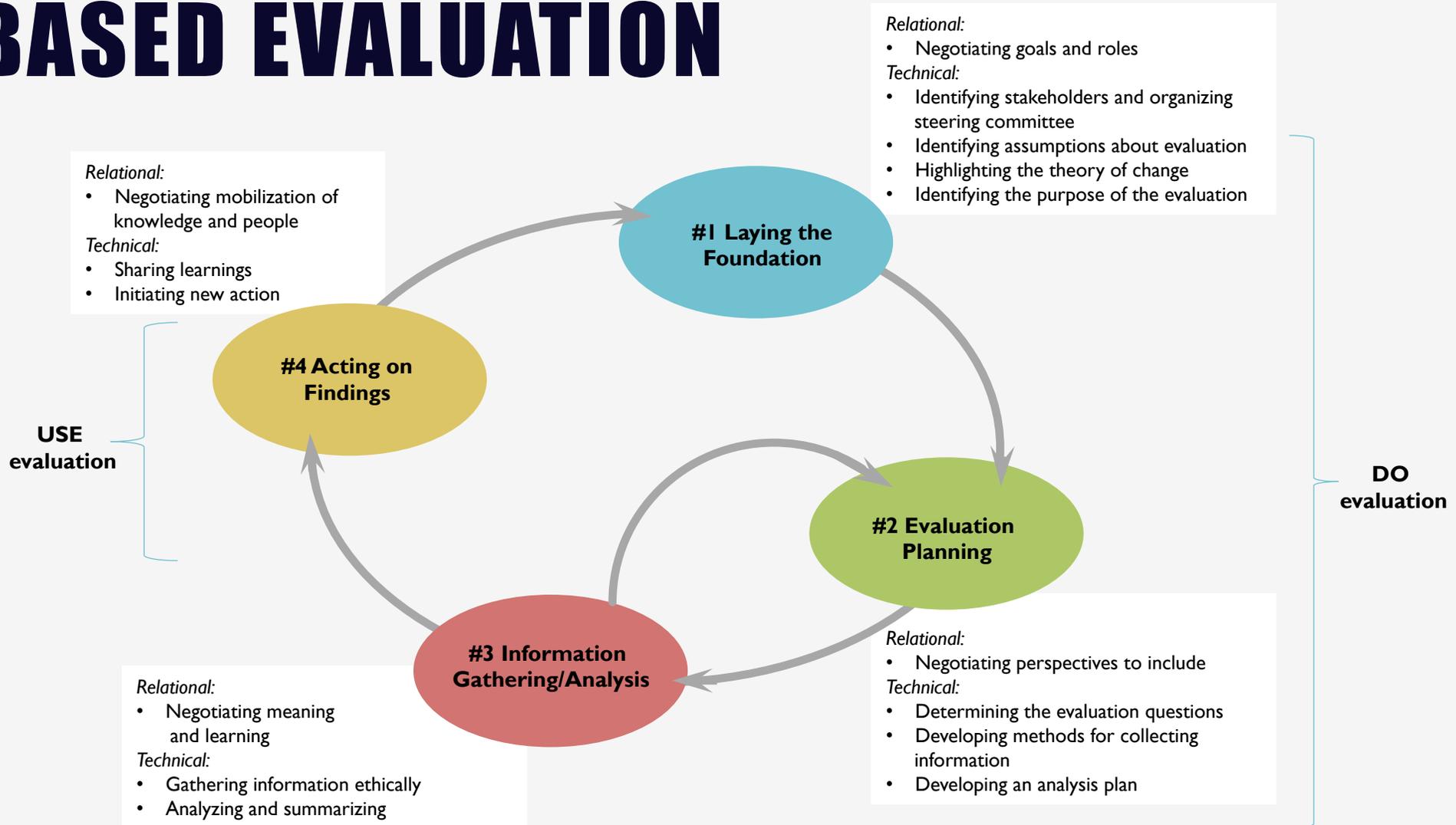
## EVALUATION THAT STRIVES TO BE...

Stakeholder-Driven	Ensure that the evaluation is practically relevant to stakeholders and is driven by the program's unique theory of change
Participatory	Program stakeholders and researchers equitably share control of the evaluation agenda through active and reciprocal involvement in the evaluation design, implementation and dissemination
Action-Oriented	The evaluation process and results are useful to stakeholders in making improvements to the program and contribute to communities where everyone is supported and belongs

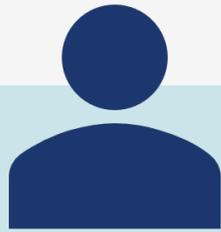
# THREE GOALS OF COMMUNITY-BASED EVALUATION



# THE FOUR PHASES OF COMMUNITY-BASED EVALUATION

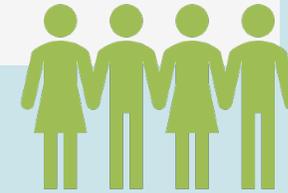


# TWO GENERAL APPROACHES TO EVALUATION



## Expert-Based

One person/group has expertise that is prescribed



## Community-Based

The collective has different kinds of expertise that is emergent

# SUMMARY DEFINITION

A community-based approach is...

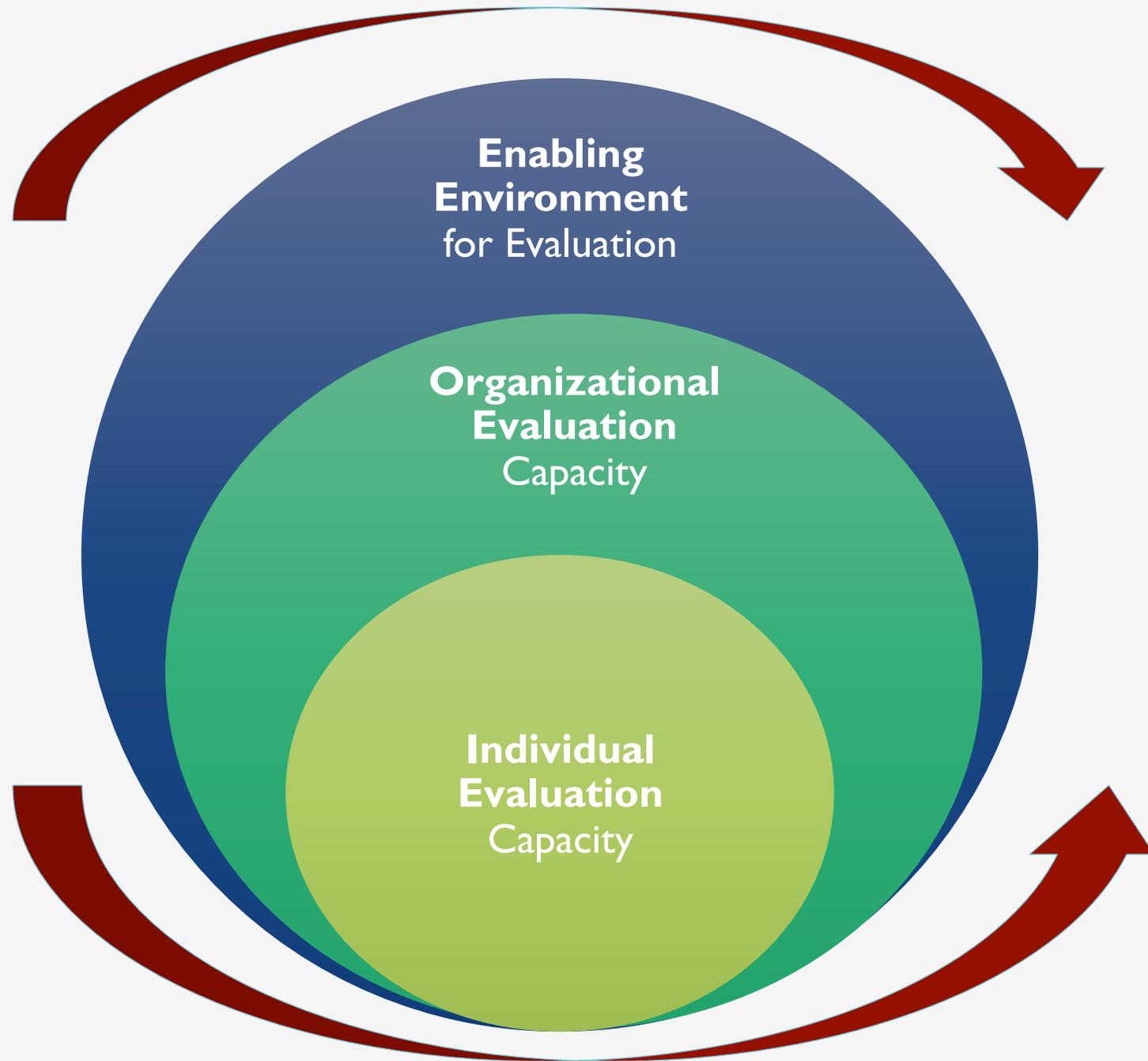
“A research approach that involves active participation of stakeholders, those whose lives are affected by the issue being studied, in all phases of research for the purpose of producing useful results to make positive changes.”

Nelson, Ochocka, Griffin & Lord, 1998, p.12





**YES, BUT WE LACK  
THE CAPACITY!**



# CAPACITY-BUILDING

## GETTING STARTED...

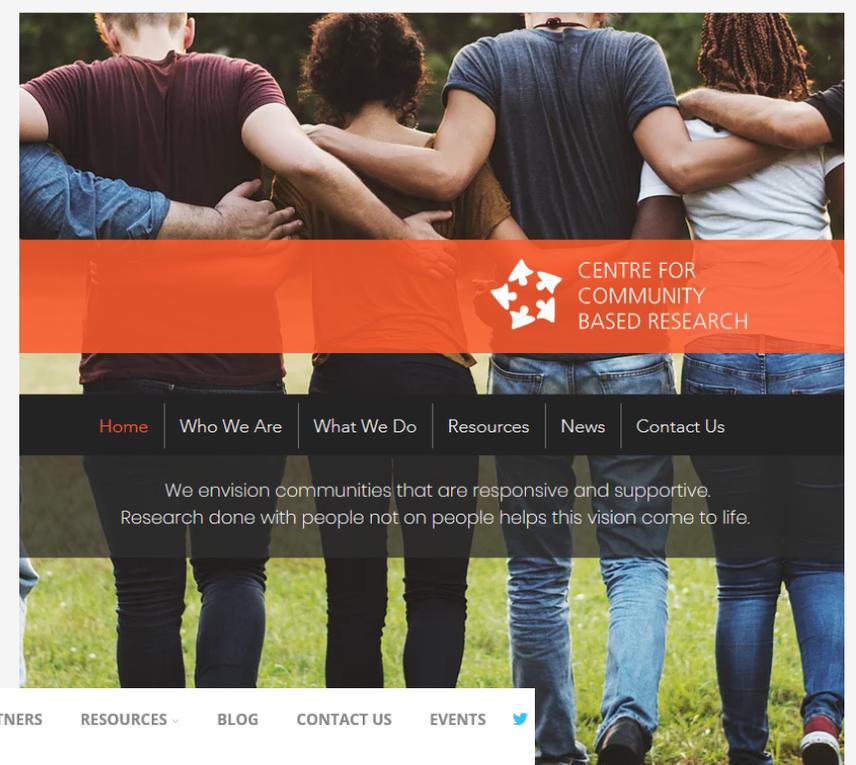
- **Brief videos**
- **Readiness assessment**
- **Ethics supports**

## READY TO GO...

- **Workshops**
- **Webinars/Live events**
- **Mentorship**
- **Community of practice**

[www.SettleNet.org](http://www.SettleNet.org)

[www.eval4refugee.ca](http://www.eval4refugee.ca)



Welcome to the

## Evaluation Capacity Network

*Dialogue about evaluation is needed to fully understand if we are making a difference in the lives of children across Alberta and beyond.*

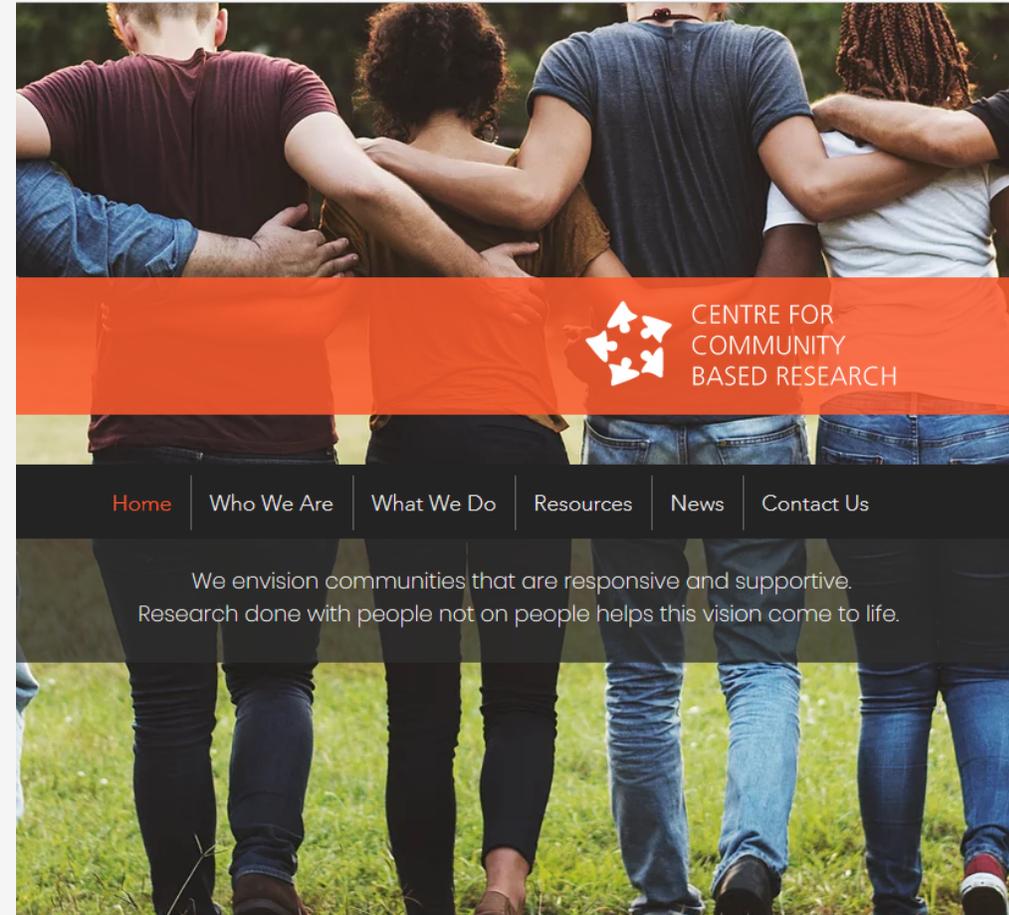


# ADDITIONAL SUPPORT



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BASED RESEARCH

- Coaching and mentoring
- Partnering on an evaluation
- Proposal development
- Evaluation support, training and webinars using the [Community Based Research Excellence Tool \(CBRET\)](#)
- Customized training in community-based research and evaluation
- For even more support, visit: [www.communitybasedresearch.ca](http://www.communitybasedresearch.ca)



# POLICY

FEDERAL INITIATIVES IN SUPPORT  
OF SPOS



# Federal Government Context

- Outcomes and results reports has increasingly been an IRCC (and Govt of Canada) priority
- The Settlement and Resettlement Program logic models → a starting point!
  - However, can be adapted, tailored, layered upon
- Look for **alignment** with IRCC outcomes... 'see yourself' and situation your program, intervention
- Focus on understanding impacts and client and program/ pilot/ initiative **results**
  - What is working well, areas for improvement
  - Scalable results / broad applicability
  - Connection to IRCC outcomes and reporting requirements
- For meaningful evaluations, some key principles to carry forward:
  - Objective assessments
  - Robust approaches
  - Reliable data

## IMMIGRATION, REFUGEES, AND CITIZENSHIP CANADA



<https://www.canada.ca/en/immigration-refugees-citizenship/corporate/reports-statistics/evaluations.html>

# Evaluating in a COVID Context

- Evaluations and outcomes assessment is even more critical in these pandemic times
  - Heightened value of evidence, baselines, performance data
- Service delivery, client interaction, reach, etc. may have changed...but the need demonstrate results has not!
- Evaluating in a COVID setting requires adjustments:
  - In scope, timing, methodologies, expectations
  - Communicate the challenges with stakeholders, partners, funders
  - Key evaluation principles still apply
- Transparent reporting, recognize gaps
- Using virtual means to connect with respondents, client populations, more reliance on existing and administrative data
- IRCC examples

## IMMIGRATION, REFUGEES, AND CITIZENSHIP CANADA



<https://www.canada.ca/en/immigration-refugees-citizenship/corporate/reports-statistics/evaluations.html>

ACADEMIC

ACADEMICS IN SUPPORT OF  
EVALUATION



# Partnering with Academics to Conduct Evaluations

- What is the value of partnering with someone who's at arm's-length from your organization?
- Partnering with academics might be mutually beneficial
  - Pool resources
- How do you find someone who will take an inclusive, community-based approach to evaluation?

**MOUNT ROYAL  
UNIVERSITY**

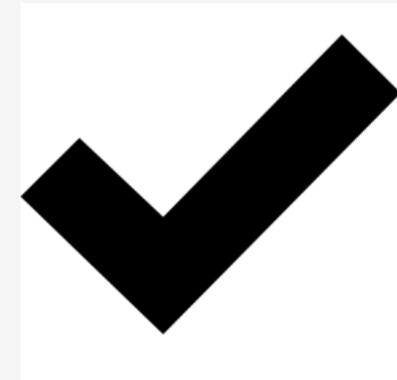


# SUCCESSFUL PARTNERSHIPS

- Strategic for both parties – mutual benefits
  - Pool resources in innovative ways
- View evaluation through a different, but complementary lens
- Inclusive approach to evaluation
- Equal partners

# SHARED VALUES

Does the researcher share and respect your organization's values and norms?



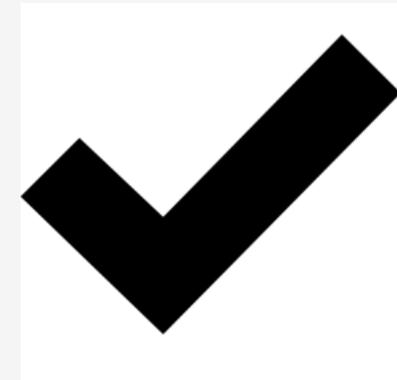
# RIGOUR

Is the quality of the methodology and analytic plan rigorous?



# KNOWLEDGE MOBILIZATION

How will the findings be moved into action? What does the future of the partnership look like?



SPO

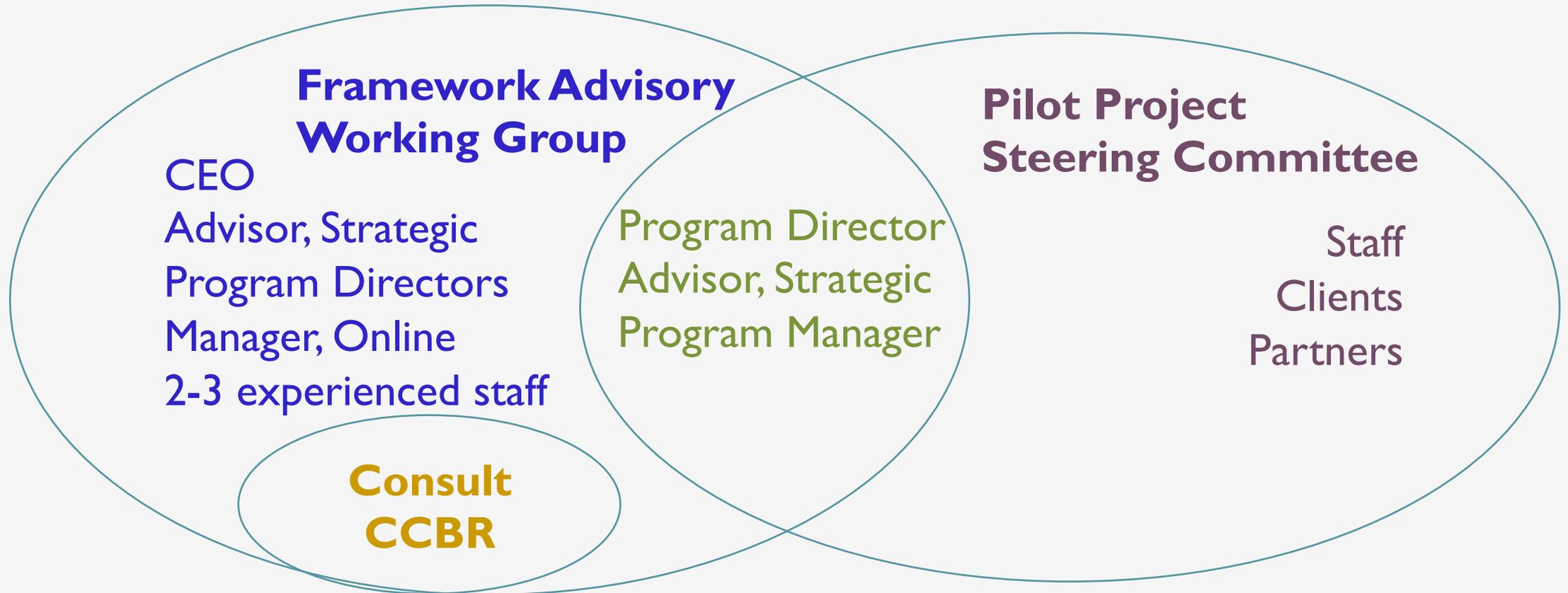
BUILDING A CULTURE OF  
EVALUATION



# HOW WE STARTED

- Agreed community-based approach is clear, aligns with our values
- Rather than trying to build a whole framework and then start evaluating, chose to begin parallel process
- Selected IRCC-SDI project with evaluation due soon as our pilot
- Created two parallel committees:
  - advisory committee oversees whole framework development
  - steering committee for first pilot project

# STAKEHOLDER/STEERING COMMITTEES



# FRAMEWORK ADVISORY WORKING GROUP

- Develop a framework and multi-year plan
- Develop an organizational logic model, link with project logic models
- Track what we learn from evaluations
- Gather high level data across the organization
- Collect and develop resources and tools
- Map and strengthen the links between evaluation, outcomes measurement, reporting and program and service development in line with the ISANS strategic plan

# PROJECT STEERING COMMITTEES

Develop an evaluation plan for specific areas of ISANS' work and to guide the evaluation process in those areas.

Plan and implement the four steps of the community-based approach:

- Laying the foundation
- Evaluation planning
- Information gathering and analysis
- Acting on findings

# ADVANTAGES OF APPROACH

- Incremental, therefore manageable
- Flexible, can incorporate other initiatives along the way
- Engages many different colleagues across the organization

# EVALUATION IN A DISRUPTIVE TIME

- Spent much time on COVID adaptations
- Found limits to virtual engagement of clients and partners
- Process was slow, but continued
- Spent time clarifying, agreeing on implementation plan

# DISCUSSION

- What strategies have you used to make evaluation meaningful?
- What are good first steps to take when building a community-based culture of evaluation?
- How have you adapted your evaluation during the pandemic?



# SOURCES

- Janzen, Rich, et al. "Building a community-based culture of evaluation." *Evaluation and program planning* 65 (2017): 163-170.
- Janzen, Rich, Joanna Ochocka, and Alethea Stobbe. "Towards a theory of change for community-based research projects." *Engaged Scholar Journal: Community-Engaged Research, Teaching, and Learning* 2.2 (2016): 44-64.
- Ochocka, Joanna, and Rich Janzen. "Breathing life into theory: Illustrations of community-based research: Hallmarks, functions and phases." *Gateways: International Journal of Community Research and Engagement* 7.1 (2014): 18.