

# The 2024 Evaluation Lab Summer Institute will begin shortly!

Create a name tent for your organization (both sides please!)



Log into the Wi-Fi:  
**LoboGuest**



Checkout  
**breakfast!**



# WELCOME

## UNM Evaluation Lab 2024 Summer Institute



# Our Learning Community

|   |                                  |                         |                              |   |                             |                       |
|---|----------------------------------|-------------------------|------------------------------|---|-----------------------------|-----------------------|
| Battered Family Services                      | Catholic Charities               | City of Albuquerque     | CLNKids                      | Dar a Luz Birth & Health Center                 | Encuentro                   | Explora               |
| Family Promise of Albuquerque                 | First Born and More              | Jeremiah's Place        | LANL Foundation              | La Semilla Food Center                          | Navajo Epidemiology Center  | New Day               |
| New Mexico Dental Association                 | New Mexico Dream Center          | NM Immigrant Law Center | NM Center on Law and Poverty | NM Office of Family Representation and Advocacy | NM Voices for Children      | NM PBS                |
| New Mexico Office of African American Affairs | Partnership for Community Action | Paws and Stripes        | Project ECHO                 | R4Creating                                      | The Golden Apple Foundation | Three Sisters Kitchen |
|   | UNM Master's in Public Policy    | UNM School of Medicine  | UT San Antonio Be Well       | Valencia Shelter Services                       | Western Michigan University |                       |

# Log into the Wi-Fi and make a name tent

Use markers and paper to **create a name tent** for your organization (**both sides** please!)



Log into the Wi-Fi:  
**LoboGuest**



# Introductions



**Audrey**

UNM Evaluation Lab  
Director

**Charla**

UNM Eval Lab  
Moderator

**Ranjana**

UNM Eval Lab  
Moderator

**Claudia**

Evaluation Lab  
Moderator



**Emma**

Logistics



**Erin**

Logistics

June 2024

2024 UNM Evaluation Lab Summer Institute

Facilitators

Support

# Audrey Cooper

Eval Lab Alum

# Nancy Ryan

Casa de Peregrinos

# Julia Hess

UNM Researcher

Thank you!



# Participants

Please scan this code and write one-word check-in on how you are feeling right now about evaluation.



Please share name, organization, town and the word you wrote!

# What is evaluation?

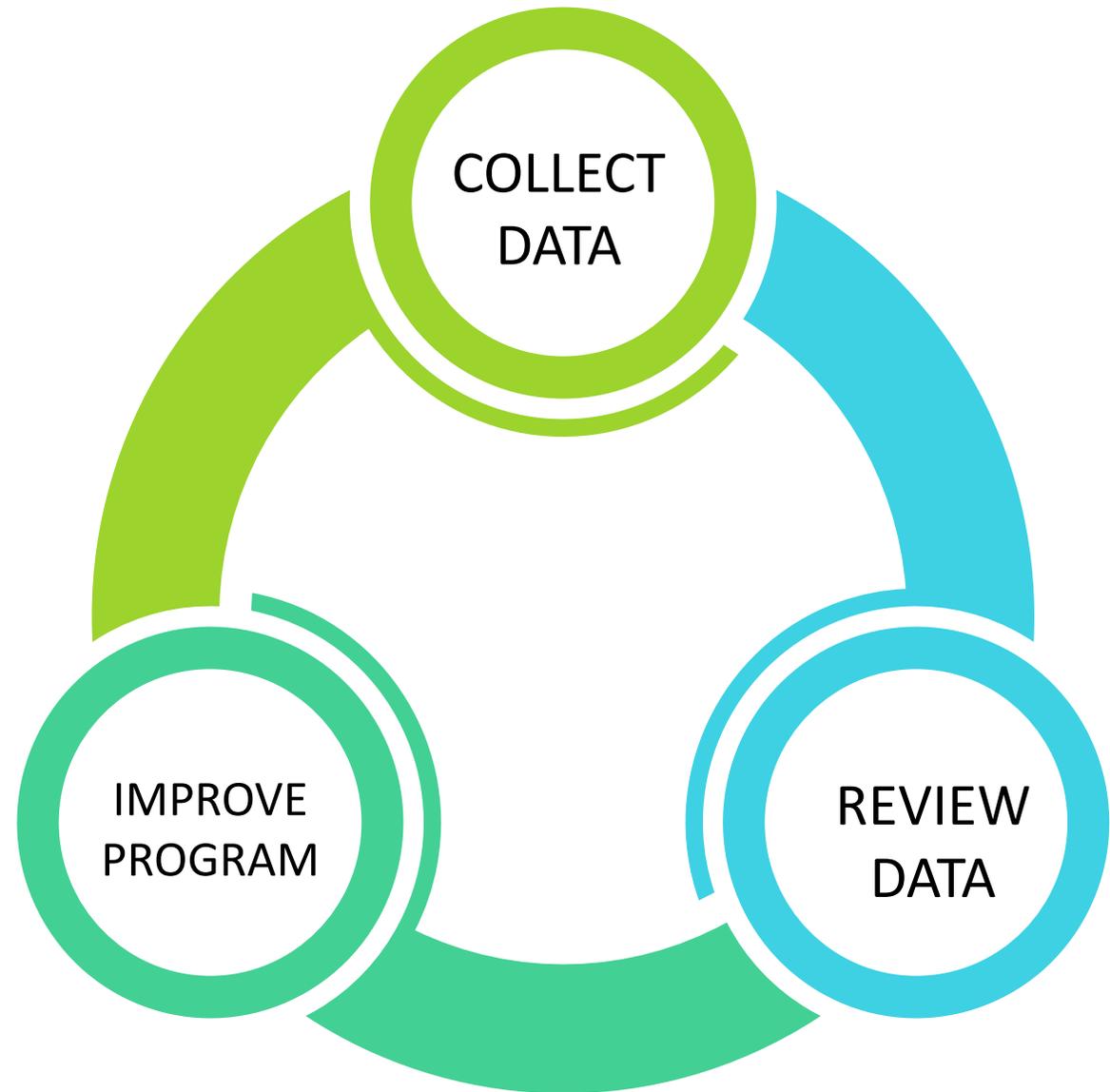
- Observing and noticing
- Noting what is working and not working
- Adjusting our actions to make things work better

# Natural evaluation

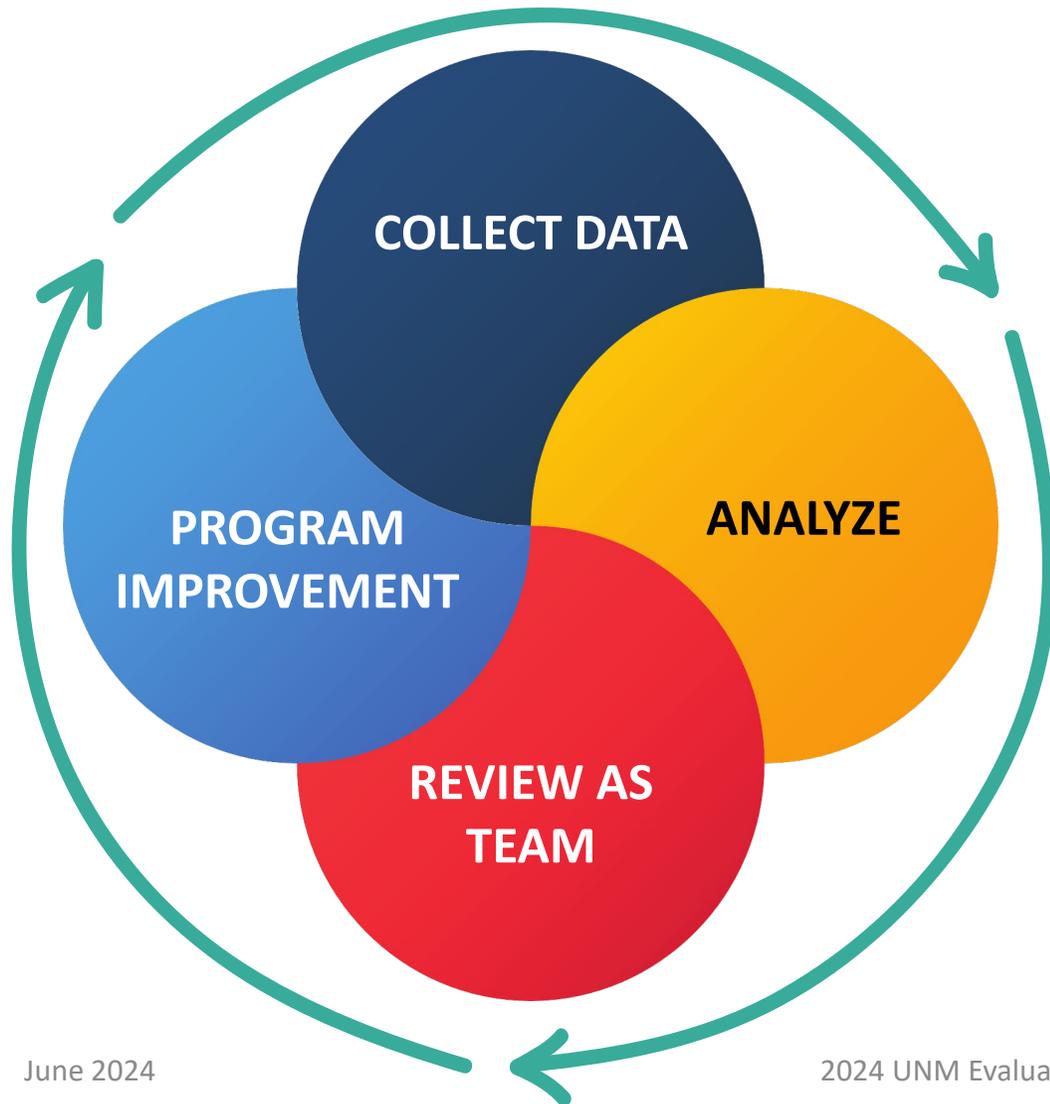
We are always **noticing** (collecting data), **noting** (reviewing data) and **adjusting** (program improvement)

## *Examples*

- Modifying a recipe
- Re-wording instructions to your clients when you find a different approach works better.



# Systematic evaluation: taking your natural evaluation process, making it intentional, and putting it on a schedule

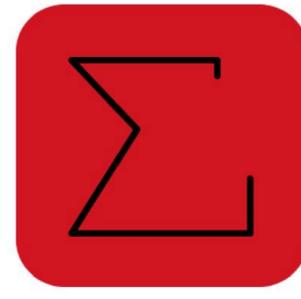


1. Collect data at set times
2. Analyze data at set times
3. Review data in a meeting
4. Adjust program
5. Repeat

# Evaluation Lab principles



Measuring  
What Matters



Embedding  
Evaluation



Participatory  
Evaluation

- measuring what matters  
and everything can be measured
- embedded evaluation  
evaluation is part of the daily routine, and is used to achieve organization's mission
- participatory evaluation  
evaluation works best when lots of people representing lots of groups are involved: leadership, front-line staff, Board of Directors, participants (or former participants), community members

# Evaluation embedding as mission time

- Moving reflection work from meetings imposed by your evaluator to time imposed by you
  - Agenda item for staff and board meetings
  - Internal evaluation coordinator / evaluation team
- Making time for evaluation means your organization will be moving in the right direction
- Plus mission time brings joy



Embedding  
Evaluation

# Covey Quadrants

Steven Covey

*7 Habits of Highly Effective People*

Habit 3: "Put First Things First."

<https://www.franklincovey.com/the-7-habits/habit-3.html>

June 2024

IMPORTANT

NOT IMPORTANT

URGENT

NOT URGENT

## Q1 NECESSITY

Crises  
Emergency meetings  
Last-minute deadlines  
Pressing problems  
Unforeseen events

## Q2 EFFECTIVENESS

Proactive work  
Important goals  
Creative thinking  
Planning and prevention  
Relationship building  
Learning and renewal  
Recreation

## Q3 DISTRACTION

Needless interruptions  
Unnecessary reports  
Irrelevant meetings  
Other people's minor issues  
Unimportant email,  
tasks, phone calls, status  
posts, etc.

## Q4 WASTE

Trivial work  
Avoidance activities  
Excessive relaxation,  
television, gaming,  
Internet  
Time-wasters  
Gossip

## NOT URGENT

## URGENT

IMPORTANT

### Q1 NECESSITY

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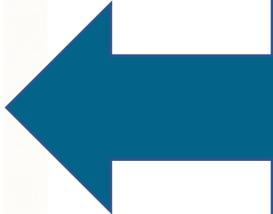
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### Q4 WASTE

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Mission Time  
Evaluation

The Evaluation Institute is serious  
**mission time**

# Our Story with Mission Time

Thinking about evaluation as mission time changed everything

- We set up time one hour, every two weeks during spring.
  - Separate from regular meetings, but sometimes we use regular meetings for mission time.
- Used that time to set evaluation goals, review data, make decisions, and planning.

# Build Your Own Evaluation Plan!

- By Friday, all organizations will have at least a draft of an Evaluation Plan.
- How?

# YOUR EVALUATION JOURNEY



# Learning by doing: Your Evaluation Plan (YEP)

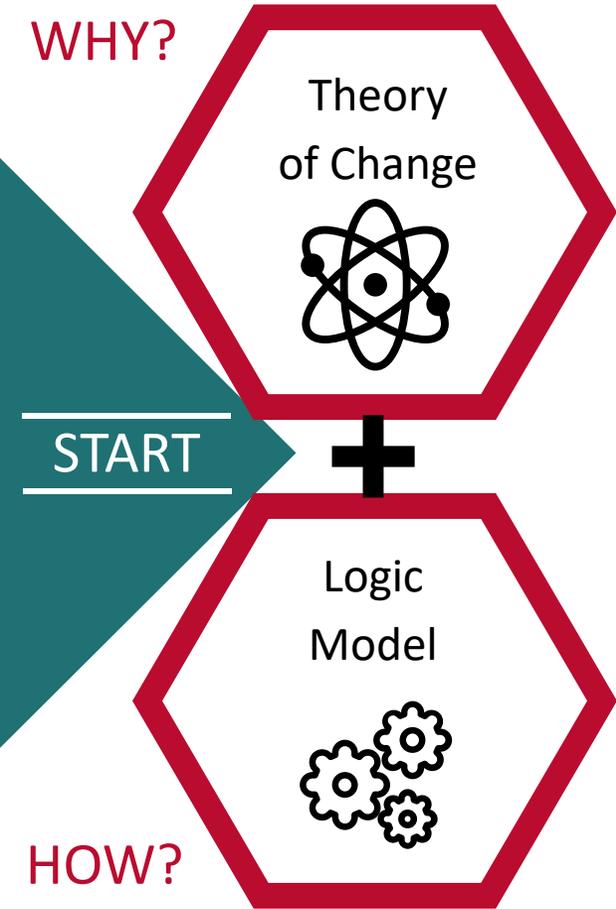
Classroom learning is ok, but where you really learn how to do stuff is when you try it yourself, and when you get ideas and feedback from other practitioners

Evaluation is lifeless until it is applied

During the Summer Institute we will present an evaluation element and have you create it immediately

Your Evaluation Plan (YEP) activities

# YOUR EVALUATION JOURNEY



Monday

**Bird's Eye View**

# Elements of an evaluation plan / Institute content

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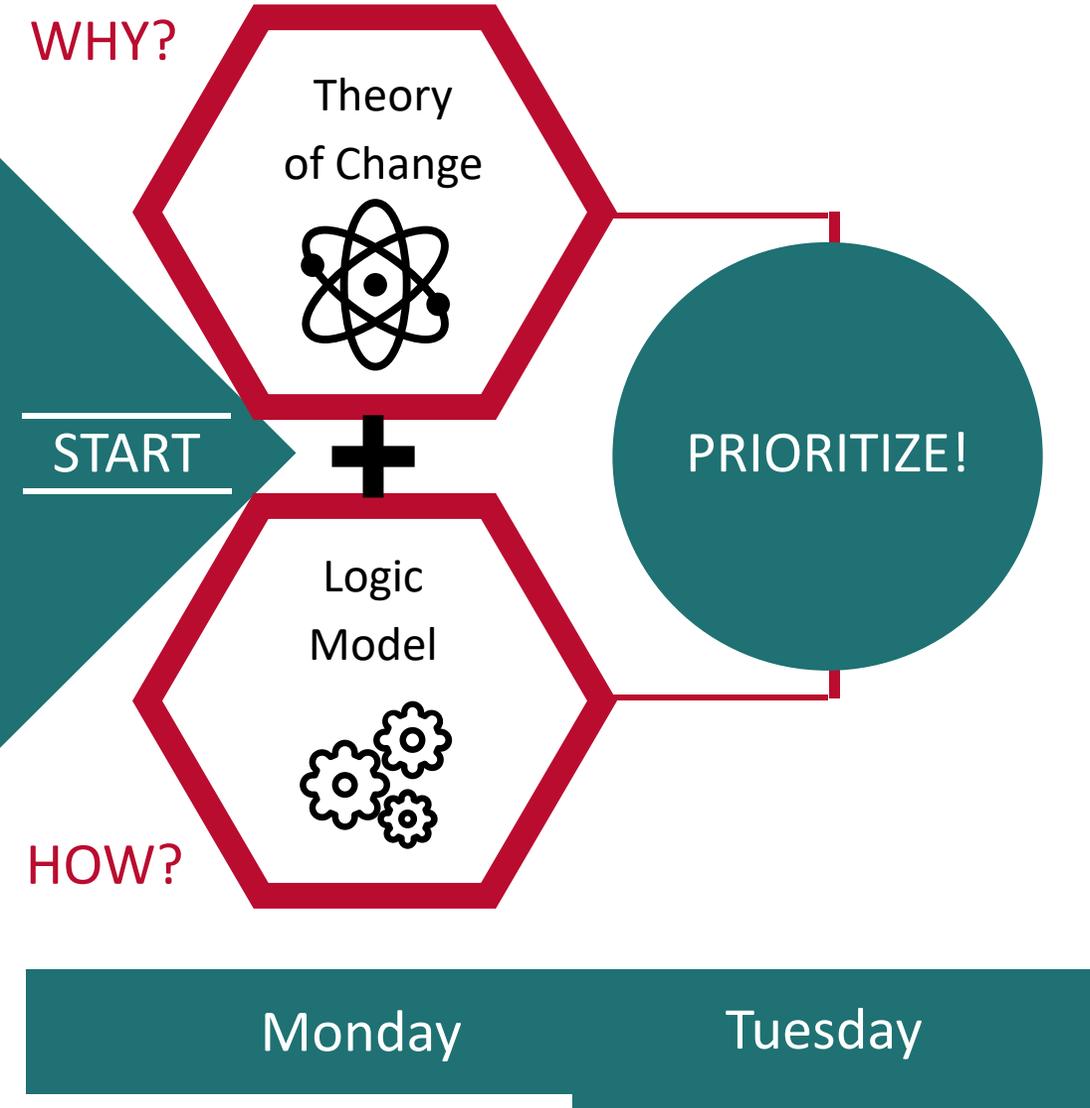
Day 1      Evaluation foundations

YEP #1    Logic model

YEP #2    Theory of change

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# YOUR EVALUATION JOURNEY



**Focus your  
evaluation**

# YOUR EVALUATION JOURNEY



# Elements of an evaluation plan / Institute content

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|              |                               |               |                             |
|--------------|-------------------------------|---------------|-----------------------------|
| Day 1        | Evaluation foundations        | YEP #1        | Logic model                 |
|              |                               | YEP #2        | Theory of change            |
| <b>Day 2</b> | <b>Measuring what matters</b> | <b>YEP #3</b> | <b>Rubrics</b>              |
|              |                               | <b>YEP #4</b> | <b>Evaluation questions</b> |

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# YOUR EVALUATION JOURNEY



WHY?

START

HOW?

Monday

Tuesday

Wednesday

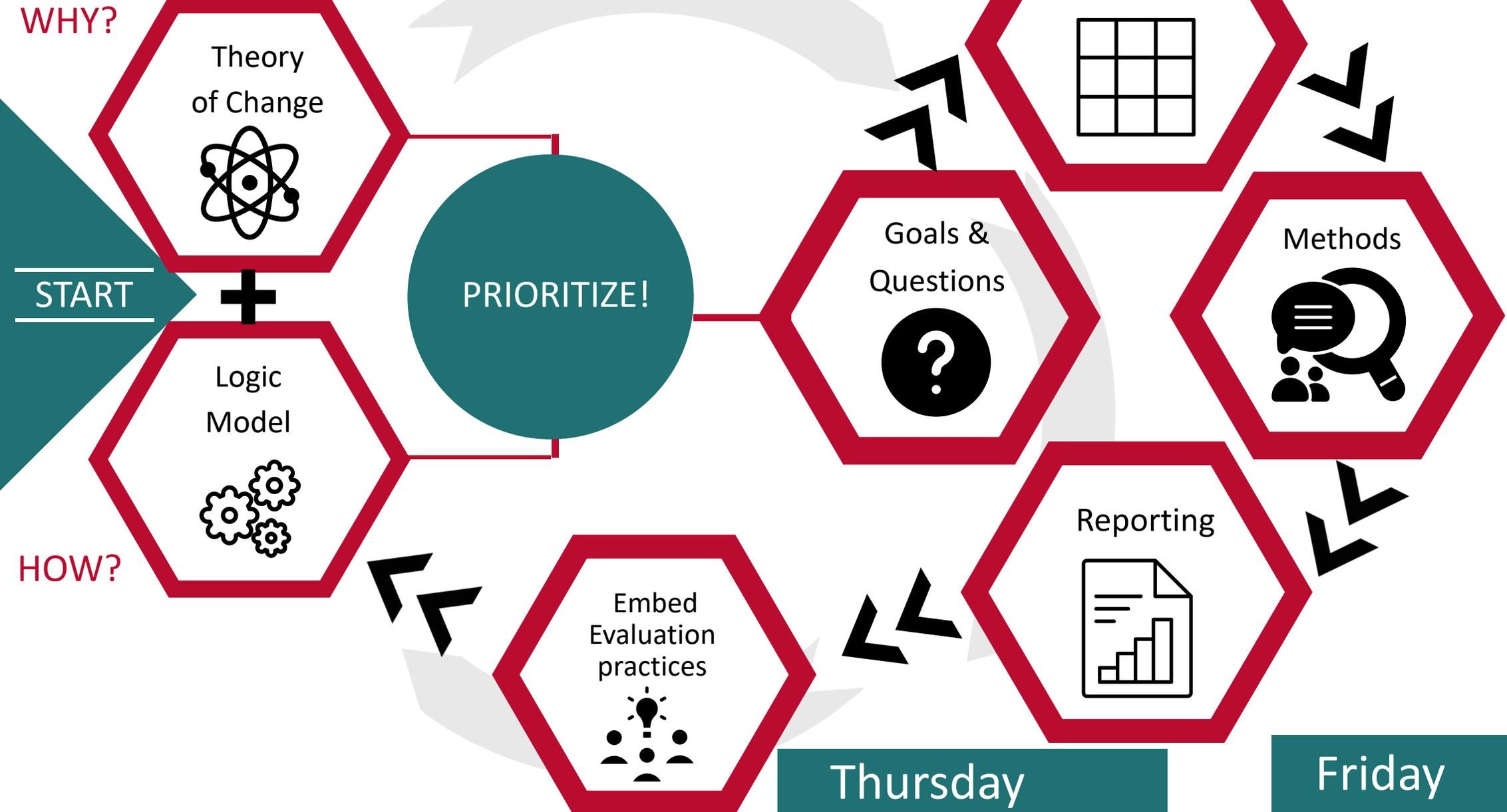
# Elements of an evaluation plan / Institute content

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|              |                               |               |                                   |
|--------------|-------------------------------|---------------|-----------------------------------|
| Day 1        | Evaluation foundations        | YEP #1        | Logic model                       |
|              |                               | YEP #2        | Theory of change                  |
| Day 2        | Measuring what matters        | YEP #3        | Rubrics                           |
|              |                               | YEP #4        | Evaluation questions              |
| <b>Day 3</b> | <b>Collecting useful data</b> | <b>YEP #5</b> | <b>Data collection brainstorm</b> |
|              |                               | <b>YEP #6</b> | <b>Data tool development</b>      |

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# YOUR EVALUATION JOURNEY



# Elements of an evaluation plan / Institute content

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|              |                        |               |                              |
|--------------|------------------------|---------------|------------------------------|
| Day 1        | Evaluation foundations | YEP #1        | Logic model                  |
|              |                        | YEP #2        | Theory of change             |
| Day 2        | Measuring what matters | YEP #3        | Rubrics                      |
|              |                        | YEP #4        | Evaluation questions         |
| Day 3        | Collecting useful data | YEP #5        | Data collection brainstorm   |
|              |                        | YEP #6        | Data tool development        |
| <b>Day 4</b> | <b>Embedding</b>       | <b>YEP #7</b> | <b>Embedding in your org</b> |
|              |                        | <b>YEP #8</b> | <b>Your plan</b>             |

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# Elements of an evaluation plan / Institute content

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|              |                        |        |                            |
|--------------|------------------------|--------|----------------------------|
| Day 1        | Evaluation foundations | YEP #1 | Logic model                |
|              |                        | YEP #2 | Theory of change           |
| Day 2        | Measuring what matters | YEP #3 | Rubrics                    |
|              |                        | YEP #4 | Evaluation questions       |
| Day 3        | Data                   | YEP #5 | Data collection brainstorm |
|              |                        | YEP #6 | Data tool development      |
| Day 4        | Embedding              | YEP #7 | Embedding in your org      |
|              |                        | YEP #8 | Presenting your plan       |
| <b>Day 5</b> | <b>Presentations</b>   |        |                            |

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# Presentations: Your plan

- Mission time plan
- Evaluation goal or question(s)
- Data collection method(s)
- Timeline

# Creating a Learning Community

# Learning by sharing

A Learning Community is a way to share practitioner knowledge

How our Learning Community will work

## **During Summer Institute:**

- Share evaluation products in small groups, then a few will volunteer to share with entire group
- We will ask for a volunteer from each table in rotation
- 8 Learning Community sessions

## **After Summer Institute:**

- Project ECHO Learning Community
- Monthly sessions
- Continued training and sharing

# Evaluation Lab ECHO Online Learning Community

3<sup>rd</sup> Tuesdays, 9-10:30am



*Everybody  
learning,  
everybody  
teaching*

- 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>

# Collaboration agreement

- We'll review on Thursday

# The Summer Institute

# Logistics - physical

- Rest rooms
- Water and coffee
- Eating

# Logistics - learning

- Binder
- Readings
  - Russ-Eft & Preskill: Evaluation in Organizations
  - Grant: The Social Profit Handbook
- Electronic resources
  - <http://evallab.unm.edu/learning-center/summer-institute-materials1/2022-summer-institute-materials.html>

<http://evallab.unm.edu> → Learning Center → Summer Institute Materials

Readings are in password-protected directory

# Questions?

# Up next:

- LOGIC MODELS