Day 2: Measuring what matters

UNM Evaluation Lab

2024 Summer Institute

11 June 2024

Day 2: MEASURING WHAT MATTERS					Tuesday, June 11th, 2024	
Start	-	End	Topic	Content	Facilitator	Readings
8:30	-	9:00	**Breakfast**			
9:00	-	9:30	**How to Measure What Matters**	Using rubrics to describe what success looks like	Claudia	Grant 2015
9:30	-	10:30	**Your Evaluation Plan (YEP #3)**	Creating rubrics for outputs and outcomes	Claudia	
10:30	-	10:40	**BREAK**			
10:40	-	11:25	**Learning Community #3**	Sharing rubrics	Claudia	
11:25	-	12:00	**Focusing**	Asking the important questions	Audrey	EIO CH 5 - Focusing the Evaluation*
12:00	-	1:00	**LUNCH**			

12:00	**-**	**1:00**	**LUNCH**			
1:00	-	2:00	**Measuring the seemingly intangible**	Nancy Ryan *Casa de Peregrinos* Julia Hess, PhD *Cultural Anthropologist, UNM* Audrey Cooper, RN, MPH *UNM Evaluation Lab*	Ranjana	
2:00	-	2:45	**Your Evaluation Plan (YEP #4)**	Focusing / Evaluation questions	Audrey	
2:45	**-**	**2:55**	**BREAK**			
2:55	-	3:40	**Learning Community #4**	Sharing evaluation questions	Audrey	
3:40	-	3:45	**Exit Ticket**			
3:45	**-**	**3:55**	**BREAK**			
3:55	-	5:00	**Your Evaluation Plan**	Tie up loose ends	Audrey & Charla	

Day 2:
Measuring what matters

Defining Success through Rubrics

June 11, 2024

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Before diving into the topic of rubrics…

- Evaluation on its own ≠ 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.

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

Circle of influence
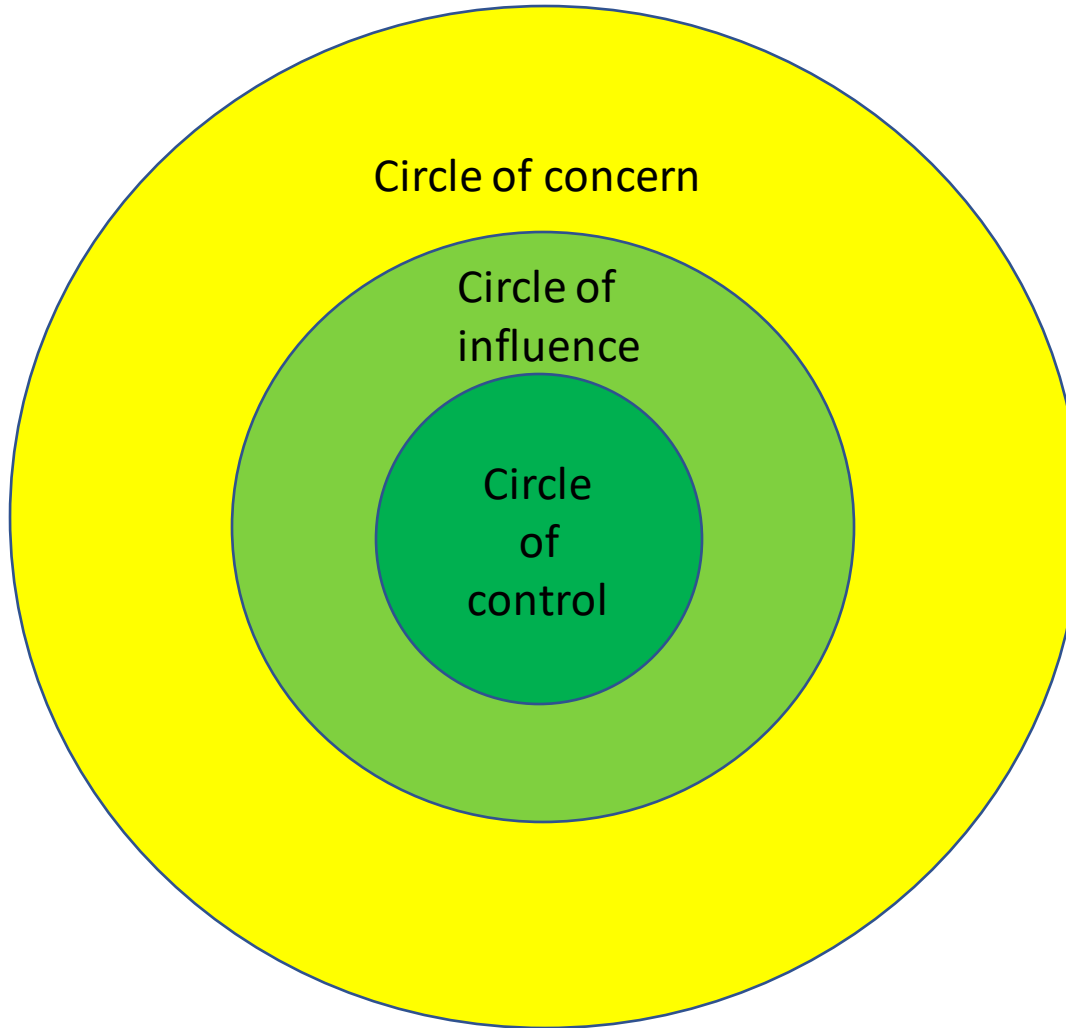
Circle of control

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

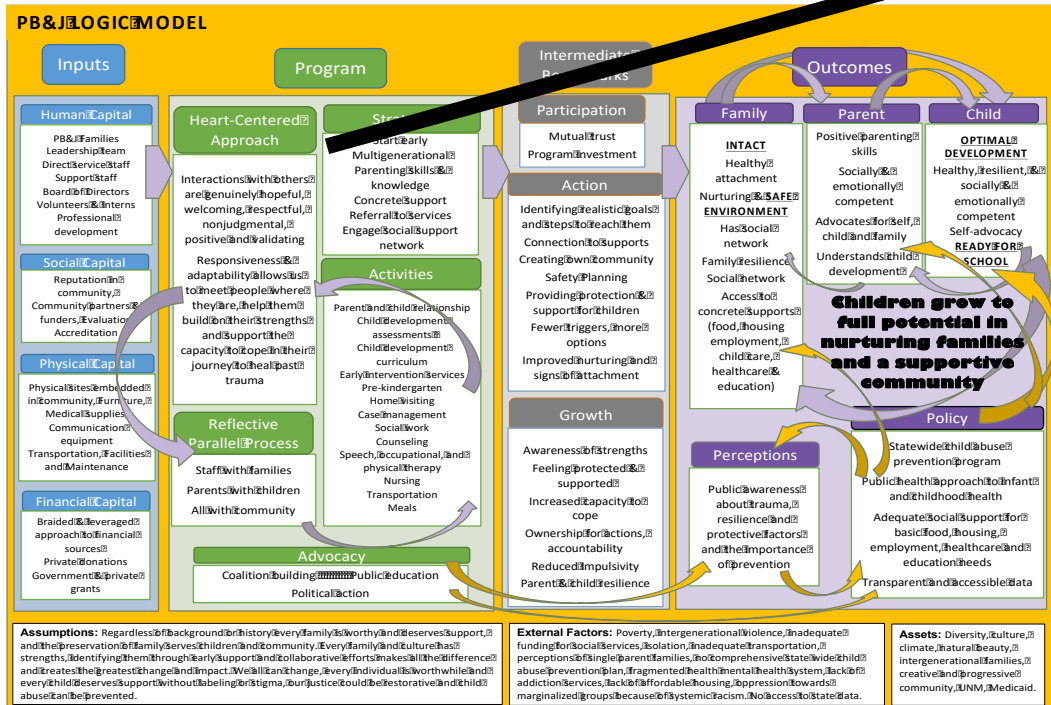Interactions with clients are genuinely hopeful, welcoming, respectful, **nonjudgmental**, positive and validating

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

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PB&J LOGIC MODEL

Inputs

Program

Intermediate Benchmarks

Outcomes

Human Capital
PB&J Families
Leadership team
Direct service staff
Support staff
Board of Directors
Volunteers & Interns
Professional development

Social Capital
Reputation in community, Community partners & funders, Evaluation Accreditation

Physical Capital
Physical sites embedded in community, Furniture, Medical supplies Communication equipment Transportation, Facilities and Maintenance

Financial Capital
Braided & leveraged approach to financial sources
Private donations
Government & private grants

Heart-Centered Approach
Interactions with others are genuinely hopeful, welcoming, respectful, nonjudgment, 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

Strategies
Start early
Multigenerational
Parenting skills & knowledge
Concrete support
Referral to services
Engage social support network

Reflective Parallel Process
Staff with families
Parents with children
All with community

Activities
Parent and child relationship
Child development assessments
Child development curriculum
Early intervention services
Pre-kindergarten
Home visiting
Case management
Social work
Counseling
Speech, occupational, and physical therapy
Nursing
Transportation
Meals

Advocacy
Coalition building   Public education
Political action

Participation
Mutual trust
Program investment

Action
Identifying realistic goals and steps to reach them
Connection to supports
Creating own community
Safety Planning
Providing protection & support for children
Fewer triggers, more options
Improved nurturing and signs of attachment

Growth
Awareness of strengths
Feeling protected & supported
Increased capacity to cope
Ownership for actions, accountability
Reduced Impulsivity
Parent & child resilience

Perceptions
Public awareness about trauma, resilience and protective factors and the importance of prevention

Family
INTACT
Healthy attachment
Nurturing & **SAFE ENVIRONMENT**
Has social network
Family resilience
Social network
Access to concrete supports (food, housing employment, child care, healthcare & education)

Parent
Positive parenting skills
Socially & emotionally competent
Advocates for self, child and family
Understands child development

Child
OPTIMAL DEVELOPMENT
Healthy, resilient, & socially & emotionally competent
Self-advocacy
READY FOR SCHOOL

Children grow to full potential in nurturing families and a supportive community

Policy
Statewide child abuse prevention program
Public health approach to infant and childhood health
Adequate social support for basic food, housing, employment, healthcare and education needs
Transparent and accessible data

Assumptions: Regardless of background or history every family is worthy and deserves support, and the preservation of family serves children and community. Every family and culture has strengths, identifying them through early support and collaborative efforts makes all the difference and creates the greatest change and impact. We all can change, every individual is worthwhile and every child deserves support without labeling or stigma, our justice could be restorative and child abuse can be prevented.

External Factors: Poverty, intergenerational violence, inadequate funding for social services, isolation, inadequate transportation, perceptions of single parent families, no comprehensive state wide child abuse prevention plan, fragmented health mental health system, lack of addiction services, lack of affordable housing, oppression towards marginalized groups because of systemic racism. No access to state data.

Assets: Diversity, culture, climate, natural beauty, intergenerational families, creative and progressive community, UNM, Medicaid.

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	☐ 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

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
Program officer: • 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.	Program officer: • 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

3 Our Standard: Respect for Grantees	4 Our Goal: Exceeding the Standard
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 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 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 *What are they trying to convey to me?*