

Day 2: Measuring what matters

UNM Evaluation Lab
2022 Summer Institute

26 July 2022



Evaluation Lab principles

- **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

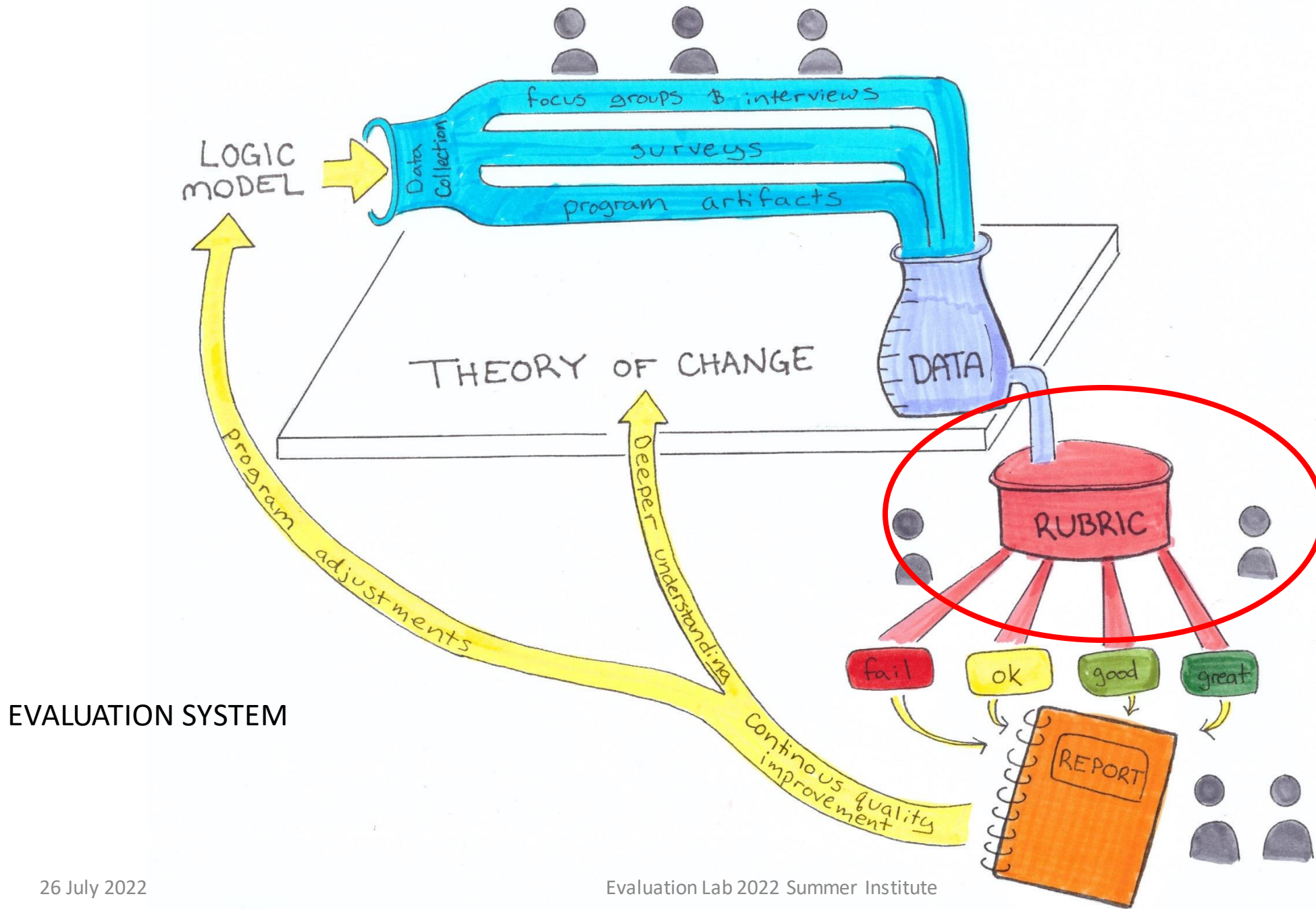


Measuring
What Matters

Day 2: MEASURING WHAT MATTERS						Tuesday, July 26, 2022	
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	Melissa	Grant 2015	
9:30	-	10:30	Your Evaluation Plan #3	Creating rubrics for outputs and outcomes			
10:30	-	10:40	BREAK				
10:40	-	11:25	Learning Community #3	Sharing rubrics	Melissa		
11:25	-	12:00	Focusing	Asking the important questions	Claudia		
12:00	-	1:00	LUNCH				

12:00	-	1:00	LUNCH			
1:00	-	2:00	Measuring the seemingly intangible	Panel discussion		
2:00	-	2:45	Your Evaluation Plan (YEP #4)	Focusing / Evaluation questions		
2:45	-	2:55	BREAK			
2:55	-	3:40	Learning Community #4	Sharing evaluation questions	Claudia	
3:40	-	3:50	BREAK			
3:50	-	4:45	Your Evaluation Plan	Tie up loose ends		
4:45	-	4:30	Exit Ticket			
3:50	-	4:40	Reading the Research literature For students taking course for credit.			Melissa

Rubrics



EVALUATION SYSTEM

Rubric: 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.”

“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.)

Rubric 7.7: Dodge Foundation Site Visit Rubric Quality of Visit and Conversation

<p>1 Poor, Unacceptable</p>	<p>2 Okay, Acceptable</p>
<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.

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Our Standard:
Respect for Grantees

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 the 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.

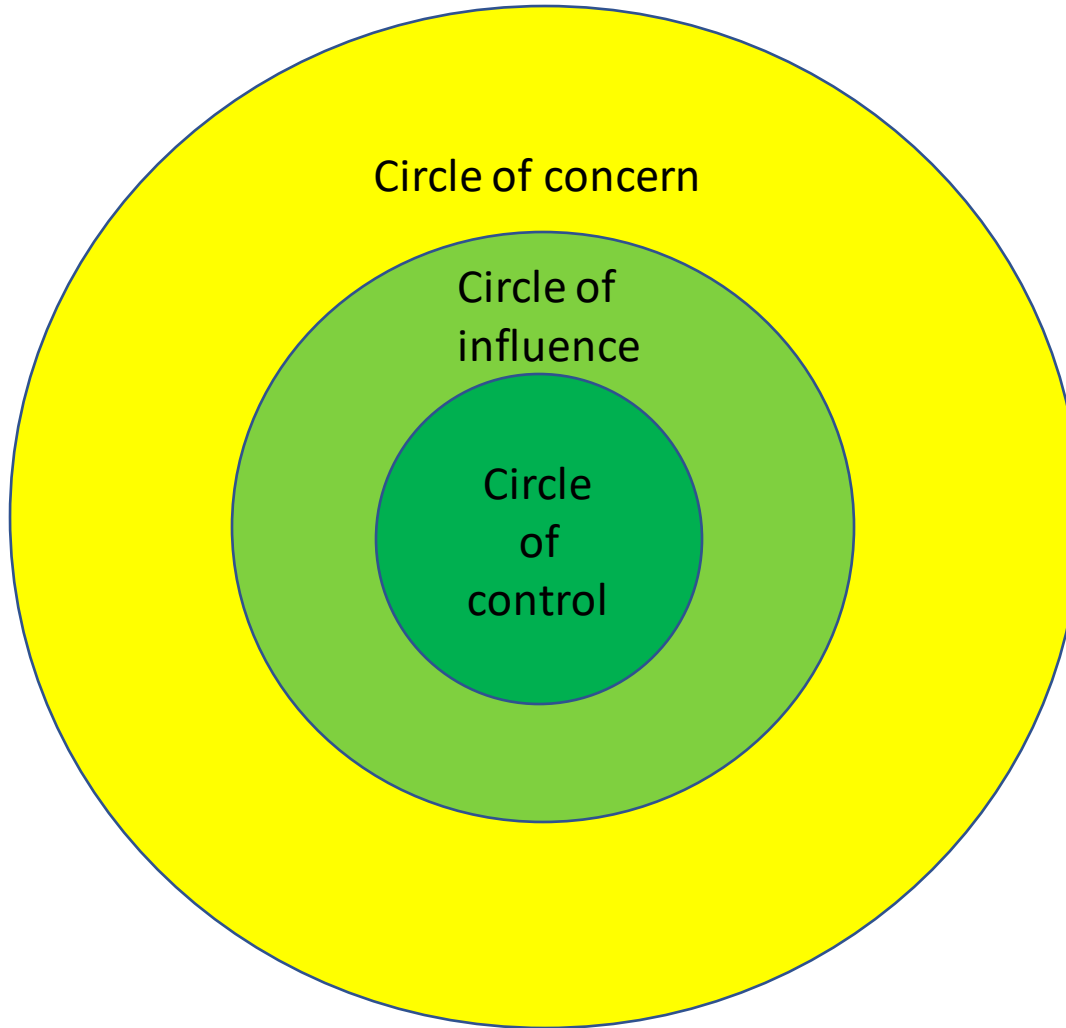
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Our Goal:
Exceeding the Standard

Program officer:

- Intervenes and significantly changes the conversation for the better by getting to important things that need to be said.
- Acts as a resource, or consultant, connects group 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?*

Why?

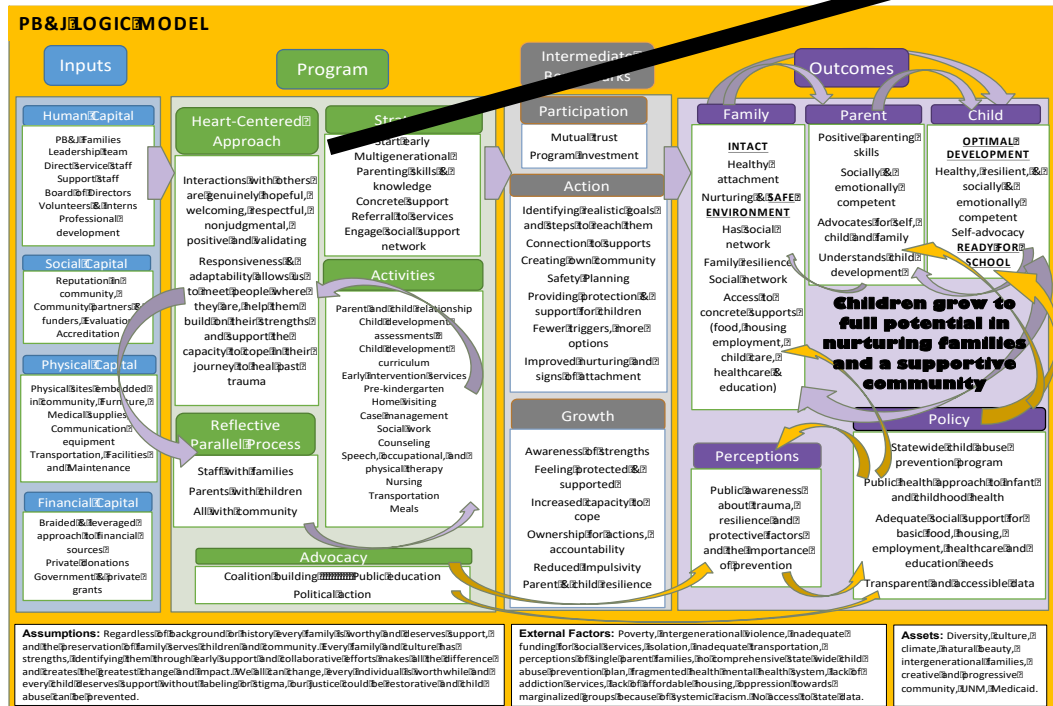
1. As a core practice, rubrics get everyone on the same page, with a shared idea—and specific description—of success
2. A rubric gives you a way to measure anything and everything
3. It allows you to develop what is in your circle of influence



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

Step 4: Aspire!

- Level 4 is what going beyond the best you have seen
- Aspirational



Heart-Centered Approach: Non-judgment Rubric

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	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
Staff Reactions	<ul style="list-style-type: none"> <input type="checkbox"/> Being verbal about not wanting to be in the home <input type="checkbox"/> Open expressions of disgust <input type="checkbox"/> Being condescending to others <input type="checkbox"/> Telling clients or staff they are terrible 	<ul style="list-style-type: none"> <input type="checkbox"/> Minimum engagement <input type="checkbox"/> Some sympathy maybe <input type="checkbox"/> Makes too many excuses 	<ul style="list-style-type: none"> <input type="checkbox"/> DV: No victim blaming <input type="checkbox"/> Open to learning <input type="checkbox"/> Praises efforts and hard work <input type="checkbox"/> Discusses failures as part of progress 	<ul style="list-style-type: none"> <input type="checkbox"/> Creates a safe environment where clients can be themselves and honest <input type="checkbox"/> Puts aside preconceived notions of someone regarding personal appearance
Staff member says things like:	<p>"You shouldn't have worn that today"</p> <p>"You chose drugs over your kids"</p> <p>"All drug users are the same"</p> <p>"I don't want to be here because you just got out of prison"</p> <p>"People don't change"</p>	<p>"Do you think it's too hot/cold for that today?"</p> <p>"You picked up your house some, but it still needs lots of work."</p>	<p>"I like what you are wearing, where did you get it?"</p>	<p>"You look amazing! I love how it brings out your eyes"</p>

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Using rubrics

- A rubric gives you concrete, specific descriptions for levels of success
Use rubrics to evaluate your outputs, outcomes, values
- 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.

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