# Evaluation Guide

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# Contents

# Section 1

## Evaluation Tips

In this age of data trends and marketing, evaluation has become a buzz word for programs and nonprofits. The word can seem daunting at first, but this guide was created to help break down the components to an evaluation and assist the reader in devising their own evaluation strategy. Evaluations are crucial for showing the impact a program has on its constituents, providing data for funders, and for assisting program managers in sharing their story with the surrounding community. This guide draws upon the experience of Barbara Lovitts at the Corporation of Public Broadcasting, Aidan Zingler who was an AmeriCorps VISTA serving at Iowa Public Television from 2014-2015, and Nancy Franz who is a Professor Emeritus at the Iowa State University School of Education.

The following are key elements of successful evaluation (Franz, 2009)[1]. Although most programs may not include evaluations when they start devising a plan, it can be beneficial to include an evaluation strategy from the onset. For those that did not, the map below can assist in building the infrastructure and strategy necessary to successfully implement an evaluation.


### Starting the Evaluation Process

When starting the process, mapping the intended program can be crucial in determining what needs to be assessed and what questions the evaluations will answer. It is also essential to train on the Best Practices for evaluations with all the staff involved in the process. See additional resources for possible sources of training.

Be sure to provide enough support for the evaluation program. This includes financial support as well as staff support. Staff support includes who is involved in the design, collection, and analyzing parts of the evaluation process. Each step in the process may require a different set of skills and knowledge areas, so try to avoid delegating the entire project to just one or two people.

Using successful models and templates can help smooth-line the process. Templates and models are included in this guide as well as in the additional resources.

### Mapping the Intended Program

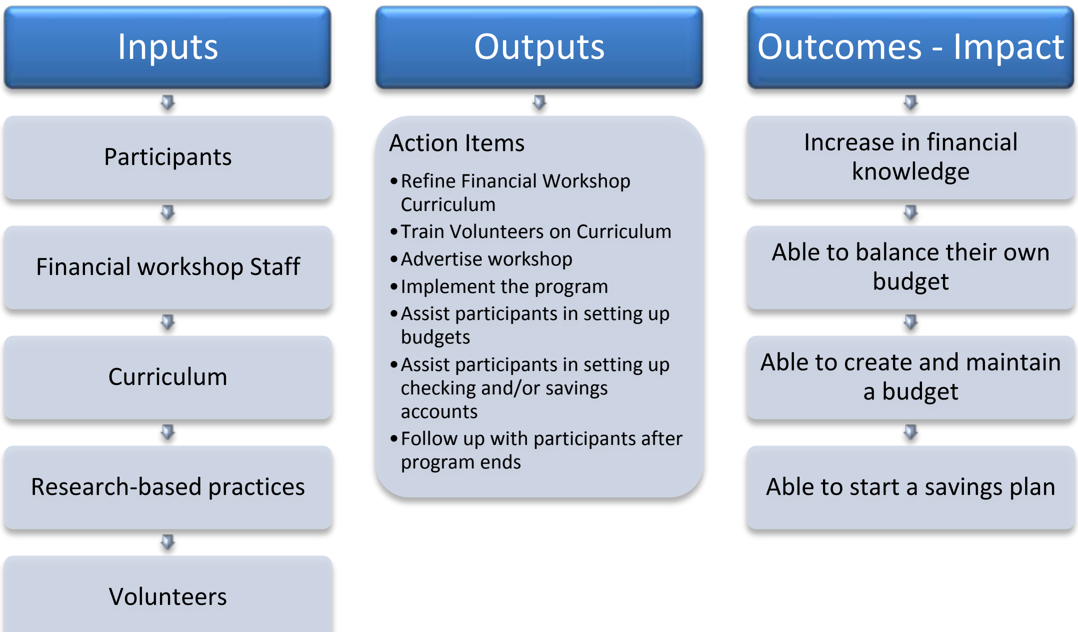
- Create (or use an existing) logic model of the program. Be specific with action items. See additional resources at the back of this guide for logic models and tips on creating them.
- Explain the purpose of the program and its goals.
- In the action items:

[1] Franz, N. (2009). Promoting Organizational Sustainability: Engaging Volunteers to Tell the Program Impact Story, "The International Journal of Volunteer Administrators," Volume 26, Number 3, page 4.

- o Show specific outcomes and list how that can be measured.
- o Each action item should only be one action. Don't try to put two or three actions or ideas into one action item. For each action item, always list possible ways to measure its outcome. This will inform what will need to be assessed in order to find the results of these action items.

### *Nonprofit A example*

Nonprofit A hosts workshops for its constituents on how to better handle their finances. Nonprofit A has developed a logic model as shown below. One of their intended outcomes is to show how their constituents' knowledge of finances have grown through their workshops. However, Nonprofit A notices that some participants do not persist through their programs, so the nonprofit decides an evaluation of their program is necessary to determine how best to improve the program and retain participants.




In each section, Nonprofit A will be used as an example to further illustrate each step in the evaluation process.

## Determine What to Assess

There are numerous aspects to a program that can be assessed. Examine what information is needed to improve the program and to determine the data needed to keep the program running. Write a description (reason) for the assessment and what question the assessment is answering. Below are possible areas that can be assessed. A sample assessment question is included with each area.

- **Personal** (Organization as a whole and/or individuals connected with the organization)
  - o Personal competency – how has it changed over time?
  - o Team process – how is the team doing?
  - o Partnerships – how are collaborations doing?
  - o Culture competence – how are you and your project doing regarding inclusion of marginalized groups and your interaction with diverse groups?

*This is comprehensive. A program may only need to focus on one or two areas such as project processes and products. Determine what the program needs for their reports to their funders, team members, stakeholders, and/or the public.*

- Personal interests – how have your interests or skills changed over time?

- **Project Processes**
  - Educational delivery/fidelity – how are you with the delivery of a resource? Are you implementing the resource in a manner consistent with the purpose of the instrument?
  - Educational context – what has changed about the environment over time? Has there been change in skill levels over time?
  - Educational materials – are the materials accessible? Are they being used by the intended audience? How are they being used? Are there ways to improve it? What impact did the materials have on the intended audience? Did the materials change the views or behaviors of the intended audience?
  - Inclusion – Is the project inclusive to people of all identities, races, etc.? How welcome do people feel in the program? What do they think of the program over time?
  - Participation – What are the participation numbers? What was it like to participate in the program from the perspective of the participant? How can participation numbers be improved?
  - Attrition – Why do people leave the program? Are people retained? Will people use the knowledge and skills gained outside the program?
- **Project Products**
  - Learning change – How have the knowledge or skill sets changed over time? What was learned in the program?
  - Behavior change – How have participant's actions and behaviors changed over time?
  - Condition change
    - Social – How does the program influence the social skills of a person?
    - Economic – Does the program increase the rate of students entering college? Getting a job?
    - Environmental – How does the program relate to environmental issues?
- **Organizational Development**
  - Infrastructure – What infrastructure is in place for a program to work well? How can that be improved?
  - Finances – Does the program efficiently use financial resources? How do the donations of individuals influence program materials and implementation? Why do people donate or not donate?
  - Staffing – Are there enough staff to accommodate the needs of the project?
  - Policies – How effective are the policies? Are they being followed well?
  - Public Value – What is the value of the program to the public?
    - Definition provided by Meynhardt, 2009: "Public value is value for the public. Value for the public is a result of evaluations about how basic needs of individuals, groups and the society as a whole are influenced in relationships involving the public. Public value then is also value from the public, i.e., "drawn" from the experience of the public. The public is an indispensable operational fiction of society. Any impact on shared experience about the quality of the relationship between the individual and society can be described as public value creation. Public value creation is situated in relationships between the individual and society, founded in individuals, constituted by subjective evaluations against basic needs, activated by and realized in emotional-motivational states, and produced and reproduced in experience-intense practices."[2]

[2] Meynhardt, T. (2009). Public Value Inside: What is Public Value Creation? *International Journal of Public Administration*, 32 (3-4), 192–219.

***Nonprofit A Example***

Nonprofit A's leaders discuss their evaluation strategy. Due to their concern over retaining participants, the leaders develop an evaluation group to examine this issue in depth. After some debate, the group determines two primary questions:

- What makes the program work well?
- What works best to recruit and retain participants?

The 'what makes the program work well' question can be broken down into the following:

- What do people like best about the program?
- Do people get what they want from the program?
- Which program components are useful for participants?
- Which components are not useful?
- What would participants like to see added to the program?
- What would they like to see changed -- how and why?

Both of the primary questions fall under project processes, where they sought to determine the efficacy of their program. The intended purpose is to improve the program in order to better recruit and retain participants. This will help them focus their efforts and decide on the best strategies for implementing the evaluation.

The 'what works best to recruit and retain participants' question can be broken down into the following:

- What motivates people to sign up for the program?
- Why do people persist in the program?
- What will help nonparticipants persist in the program?
- How does the program marketing need to change?

By breaking down the overall questions into one-topic secondary questions, a strategy for the evaluation begins to emerge. For Nonprofit A, their secondary questions lead them toward a mix of qualitative and quantitative strategies. The 'which' questions are perfect for quantitative analysis. However the 'what' and 'why' questions lend themselves more toward qualitative analysis. This leads us into our next section, which discusses how to create the evaluations.

## How to Assess

Decide the focus of the assessment. This will include the research question and the intended purpose. The focus will guide the method of collection. Often times, mixed methods, meaning the use of both quantitative and qualitative methods, produce the best data quality.

For example, if the research question is focused on behavioral change, a mixed method of survey and interview data may be useful. The survey data will provide quantitative measurement of change, but the interview data will show the impact such as how the individual integrated the knowledge into the different arenas of their life. The more integrated the knowledge is, the more likely the behavior change will be sustained over time. Evaluating the integration of knowledge cannot be effectively measured by a survey, as numbers are not always the best indicator of integration of ideas.

**Surveys**

- Explores "What happened?"
- Good for Quantitative data.
- Good for determining the *breadth* of a project.
- Good for trends.
- Not effective at determining the *depth* of a project.

**Interview and Focus Groups**

- Explores "Why did it happen?"
- Good for in-depth information.
- Good for stories.
- Good for understanding the why of trends.
- Good for understanding the project's impact on the individual's belief structure, interests, and who they are becoming.

Exploring the impact of a program in-depth can reveal if the project will be sustained over time.

*For interview and focus group tips, see the next section concerning Qualitative Data.*

**Nonprofit A Example**

Nonprofit A has done program evaluations in the past, and so when assessing their methods, they draw upon this history of quantitative data to summarize what is known for each primary and secondary question. They determine that mixed methods are best and decide to use focus groups. Their goal is to include at least thirty participants and stakeholders in the focus groups. The decision to use focus groups stems around the desire for a better understanding of the trends from their previous data and to understand the value of the project components for the individual. The goal for the evaluation is to dig deep into the heart of the project and hear the stories of the participants in detail.

## Design the Evaluation

*For interview and focus group design, see the next section titled Evaluation Strategy: Qualitative Data. Below are generalized tips.*

Surveys are best at collecting quantitative data and evaluating the breadth of a project or program. Surveys are often the most common type of evaluation used by organizations. Here are tips to keep in mind during the survey design process:

- Do be concise and clear with the wording on questions and possible answers.
- Do be specific in the question wording and multiple choice answers. Keep each question focused on one item only.
- Don't use vague answer choices like "sometimes" or "often." Instead be specific, such as "daily" or "2-5 times a week" or "2-3 times a month" or "never."
- Avoid double-loaded questions. Each survey question should ask about one item only. (For example, do not ask "Did the specialist answer your questions quickly and effectively?" Ask this as two separate questions.)
- Avoid leading questions. You don't want to lead a respondent toward an answer you'd like to see. You want their answers to be unbiased by your hopes for the survey.
- In the introduction, be accurate with the amount of time the survey will take. Do not say it will take five minutes when it actually takes thirty or more minutes. (A five minute survey is generally less than ten questions. A ten to twenty minute survey is between ten and fifteen questions. If a survey has a lot of open-ended questions, then the survey may take longer.)
- Close-ended questions are good for numerical data.

  - When asking if a person disagrees or agrees with a statement, use the Likert scale. Try to use a four or six point scale that does not have "neutral" as an option in order to force people to indicate whether something leaned more towards the positive or the negative.
  - Close-ended questions are quick and easy to answer but don't work well for complicated ideas.
  - Make sure only one item is covered in the question.
  - Yes/No answers are close-ended.
  - If asking 'how often' something is used, close-ended answers can keep answers consistent over time. Be specific when listing potential answers.
- Use open-ended questions for more qualitative data such as asking for feedback on services rendered or to evaluate how someone implemented the materials in their work. (Expect less participation with open-ended questions as people are less likely to write a lot of words.)

**Nonprofit A**

Nonprofit A has determined that they will use a mixed method design within their focus groups. They create a set of cards that list the program components, so that the participants can rate each card on a scale of how useful they deem that component of the program. They then establish questions to ask participants that include open-ended and close-ended questions.

The close-ended questions allow quantitative data to be more easily drawn out of the discussions, but the open-ended questions allow for stories based around participant's experiences of the program. The evaluation team creates a pilot group with stakeholders in order to refine the focus group protocol for use with the remaining focus groups.

Focus group questions have three types:

- Engagement questions, where participants are introduced to and made comfortable with the topic of discussion.
- Exploration questions, which digs deep into the topic.
- Exit question, which is used to check if anything was missed in the discussion.

The protocol within a focus group includes not only the questions that will be discussed, but should also includes expectations for the group and a script with the introduction, questions, and exit discussion.

Nonprofit A carefully writes the questions to create a free-flowing session, in order to create a safe and comfortable setting for participants to explore their thoughts on the topics. Each question focuses on one dimension to avoid confusion and ambiguity, are open-ended and worded to avoid a simple 'yes' or 'no' answer. The card sorting part of the focus group is primary quantitative data, but the questions used within the protocol will be the primary qualitative data. All moderators are given identical reflection sheets for their observations, insights on the progress of the group, and other relevant information about the group itself.

## Collect and Analyze the Data

Sampling is the technical term that describes the target population for a survey or qualitative study. Random sampling is often the best as it reduces bias, but it is difficult to do. In order to recruit people for surveys, focus groups, or interviews, a multitude of distribution methods should be used. Methods include social media, internet forums, local universities, websites, emailing, print letters, or texting.

Once a sample is found, follow the protocol. When determining how long to keep a survey open, it may be best to use a time period that matches the audience, survey platform, and evaluation timeline. Interviews and/or focus groups should be done during times where the target population is most accessible.

Once the collection phase is complete, start analyzing the data. See Section 2 for a guide on analyzing Qualitative Data. Also, tips on analyzing Quantitative Data in Survey Monkey and in Excel are included in Section 3 of this document.

**Nonprofit A Example**

Over the course of several weeks, Nonprofit A trains their moderators and implements their focus group protocol with four focus groups and thirty-two participants and stakeholders. The protocol assists in keeping the focus groups consistent, providing a similar experience for each group. In order to analyze the data, the evaluation team holds a data party with stakeholders, and utilizes qualitative analysis methods such as the constant comparison method and Steve Patty's approach -- both discussed in the next section of this guide.[3]

Nonprofit A discovers that most of the components to their program are considered very useful by participants. However, they also learn that the scholarships and mentorship parts of their program are not rated as highly as the others. Further analysis reveals that participants did not find much value in these components, and some did not find them as accessible as other parts of the program. As the data analysis continued, Nonprofit A begins to formulate a story about their financial program. This allows them to create a new marketing strategy to draw in more participants, and they are able to tweak parts of their program to better serve their participants, which improves retention rates. Through the analysis, their analysis themes becomes the core of their story, and this story transforms their message to the world, drawing in more participants over time.

The analysis of the results allows Nonprofit A to see the outcomes of their program more clearly and to see the direct impact their program has on the participants' lives.

Although this example does not provide specifics, it is provided as a narrative to assist readers in walking through each step. Just as Nonprofit A uses their data to tell their story, let's examine how a story can be told from the results of your analysis.

## Tell the Story

All evaluation data is a story of sorts. This story may include numerical data as well as qualitative data from the participants' lived experiences.

Framing it as a story makes it more accessible to stakeholders, staff, and the public.

[3] Steve Patty, Ph.D. is a consultant for Dialogues in Action, which trains teams and programs in evaluation practices, leadership techniques, and nonprofit strategy and program development.

Data and graphs are not the best way to frame the story as people may not have access to the context of the tables and graphs. For example, seeing a chart that lists parts of a program and how many rated it high or low may look pretty, but the reason why participants rated one component more useful than another cannot be shown through the graph. This larger context has to be provided in a narrative.

The graph or chart only shows us the what, but the narrative reveals the why.

To provide that context, a report can be used to aid in framing the tables and graphs into a digestible story:

- The introduction of the report provides the reasoning for the evaluation, information about the program being evaluated, and why the evaluation is important. It also makes the case as to why people should care about the results.
- The methodology explores how the evaluation was implemented and who was involved – such as who the evaluators are, what evaluation methods they used, and who the respondents (sample) are.
- The results section contains the questions used along with their resulting graphs, tables, and/or qualitative data such as quotes.
- The Discussion and Conclusion is the meat of the story and should answer the following questions:
    - What did the evaluators discover?
    - Do the results support or negate the evaluation question?
    - What are the lessons learned?
    - Were there any biases that influenced the data?
    - What are the recommended strategies for the future?

See Reporting Findings in Section 2 for further information on reports.

Another way to tell the story of the data is to create pamphlets or brochures that describe the data through narrative. This can include the numerical data as well as quotes from participants. Other ways of sharing the evaluation story can be done through website design, magazine articles, word of mouth, advertising blurbs, newsletters, and other forms of communication. Be creative when sharing the story of your organization's findings!

# Section 2

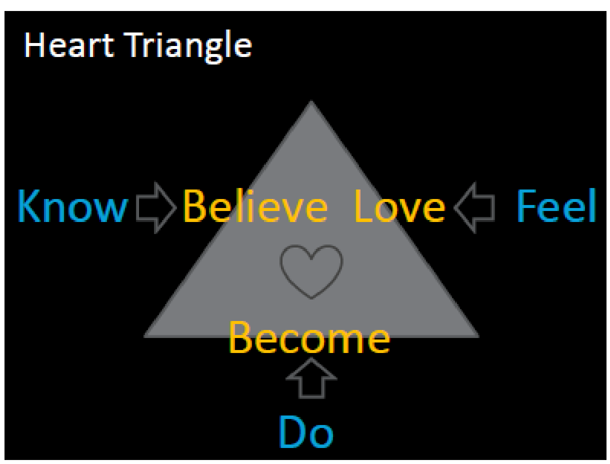
## Evaluation Strategy: Qualitative Data

Qualitative data is defined as anything that cannot be expressed by a number, and often represents information about a person's thoughts, beliefs, behaviors, or nominal scales such as gender, socio economic status, religious preference, etc. The following framework is useful in constructing qualitative data strategies. [4]

A protocol is often needed in order to establish a standardized approach to various qualitative methods. It is important to also have a standardized reflection sheet that is given to all interviewers and moderators, so that their flashes of insight, observations, and other important data can be recorded at the time of the interview/focus group. This can provide context to the analysis part of evaluations. Here are some important tips to keep in mind:

- Use open-ended questions in an Interview and/or Focus Group. Avoid close-ended questions as you will receive less data.
- Avoid questions that use the Likert scale and have yes/no for an answer.
- Focus groups need a moderator/facilitator, comfortable room, treats and drinks, and the session recorded through written notes or by audio capture.
- Focus groups should also have a handout of session questions to encourage verbal discussion as well as any written discussion. Collect these at the end of the session.
- Interviews can be conducted in-person (best), by phone (lacks nonverbal cues), or by email (lacks tone of voice and nonverbal cues).

### How to write qualitative questions:




In order to really understand the program's impact on the population, the study must dig deeper than just numbers. By digging deeper, the study will discover how the program may have transformed the participant's

[4] Theory covered in Steve Patty's training at Iowa Commission of Volunteer Service, and presented to Aidan by the 2015 VISTA Leader, Daniel Mills. See his website: http://www.dialoguesinaction.com/evaluation/

beliefs/values toward the program topic (believe), how the program may have changed their attitudes or practices or approach to the program topic (become), and how the program may have transformed their commitment and/or served as inspiration for future engagement (love).

Sustainability of programs is often done through this heart triangle. When an individual and/or organization alters their practices, beliefs, and/or commitments because of the program, they are more likely to continue to use what they learned and received after the program is completed.

## Ways to Gather Qualitative Data

- Conversations (30 – 90 minutes long)
    - In-depth interviews (typically one-on-one)
    - Focus groups (typically 6-10 individuals)
- Observations
    - Participant observation
    - Self-report
- Artifacts
    - Documents used in daily work, files, statistical records, meeting minutes, emails, and memos.

## Examples of Questions

Know →believe

"What did you learn about tracking finances?" → "How have these methods influenced your ability to manage your finances?"

Do →become

"What resources has been the easiest to implement? The most difficult?" → "What kind of capacity needs to develop in your organization in order to implement these resources? *Or* how has these resources changed your approach to financial development?"

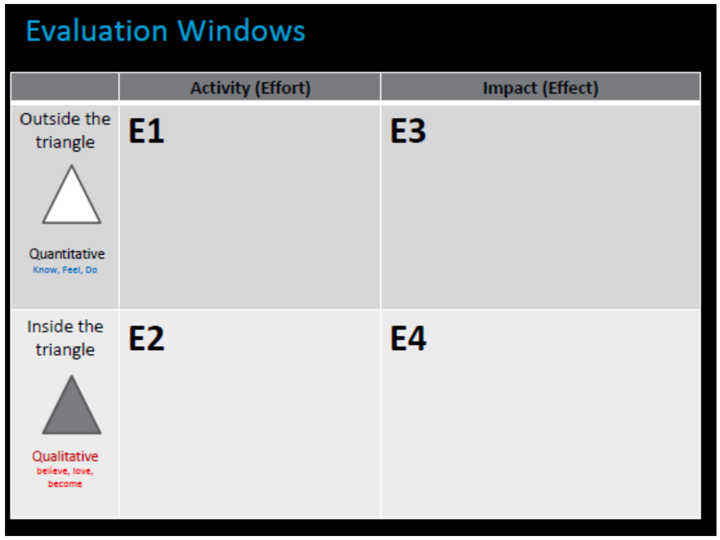
Feel →love

"In what ways has this project increased your collaboration with other organizations in your community? → How has this collaboration influenced your personal and professional growth?"

## Working Strategy

Below is the approach to building a working strategy. E1 and E2 are the activities done within the program; this will include engaging partners, delivering resources and training, hosting events, etc. E3 and E4 are for evaluating the program's impacts. [5]

[5] From Steve Patty's Evaluation Training, presented to Iowa Commission of Volunteer Service. See his website: http://www.dialoguesinaction.com/evaluation/




Surveys work well for E3. This will give a program quantitative data but not very much qualitative data. It cannot provide specifics on how much of an impact the program made on the organization's and staff's beliefs/values, practices, organizational capacity, etc. Although surveys may provide numbers for the program, numbers cannot provide a more indepth analysis of the program's impact on its participants and/or communities.

In order to explore the impact on the organization and its staff (E4), qualitative data collection is needed.

## Analysis

Once an evaluation is concluded, analysis is necessary, as often the results of data collection should not be taken as is. We, as human beings, tend toward snap judgments, and often will try to jump straight into applying the results. Resist that urge, because often the best insight and information comes when things simmer a bit, allowing time to examine the data for nuance and subtleties. Apply rigor to one's thinking.

In qualitative studies, analysis is the most important part of the process. It will allow emergent themes to blossom from the data, and it will also help avoid bias. If a program jumps straight to results by looking at graphs and tables, the interpretative analysis is missed and incredibly important themes may be lost.

Steve Patty, Ph.D, an evaluation instructor, writes: "analysis requires you to interpret the data (what does it mean) and then explore principles related to the data (values and theories that help make sense of this)."[6]

Interpretation requires inductive and deductive analysis. For inductive analysis, this involves reading the data and through that, the strands of meaning begin to emerge. These strands of meaning are often called emergent themes. It is these themes that will become the basis for any findings.

Deductive analysis is where key theories are used as lenses in which to look through the data to find strands of meaning (emergent themes). The theory of the "heart triangle" is one such theory, where each part of the study is examined for any indication of what the interviewee believes, loves, and is becoming.

[6] From Steve Patty's Notes for Practitioner.

One way to do this is by the following method:[7]

| What | How | Why | Heart Triangle | Themes |
|---|---|---|---|---|
| | | | | |

To use the above table:

1. Read the data through the lens of "what." (What are they saying, what key words or key ideas are used, key emphases, etc...)
2. Read the data again through the lens of "how." (How do they make sense of the question, frame their answer, see their world, see themselves and others, etc…)
3. Read the data a third time through the lens of "why." (Why do they answer as they do, see certain things and seem to miss others, pursue what they do, etc…)
4. Finally, examine the data a fourth time through the lens of theory . For example, one could use the Heart Triangle: what do they believe about the topic(s), who are they becoming or how has the topic(s) changed them, and what do they love or dislike about the topic(s)).
5. Set aside the data and examine only the analysis. Write down themes that emerge. Themes can be a notable absence of something one expected to see as well as the presence of substantial things.

Another method available is Constant Comparison.[8] To do this, follow these steps:

1. Read through the entirety of the data and identify codes. (Words that sum up a section of the data. For example, for nonprofit A qualitative studies, participants may mention making budgets. This may be a good code to use to describe that section of the data.)
2. Go 1-3 sentences at a time and classify those sentences with a code. Make sure if new codes are identified in later sections of data that they are compared to the older sets of data to see if those ideas appear there as well. Keep a list of the codes and the definition of each code.
3. Count how often the codes appear. This may help identify patterns in the data, but keep in mind that participants do not need to use a word frequently in order to convey important concepts. The word count method is useful in maintaining analytic integrity to try to avoid underweighting emergent themes, but should always be used in conjunction with other methods.
4. Examine the codes found within each of the interviews. Write down themes that emerge from this analysis.

Always include more than one method of analysis in order to increase the rigor and credibility of the findings. Another important tip is to include methods that work against what evaluators hope to find in the data set. If

[7] Method explained by Steve Patty, Ph.D. during the ICVS training. His website is called Dialogue in Action: http://www.dialoguesinaction.com/evaluation/

[8] Dye, J. F., Schatz, I. M., Rosenberg, B. A., & Coleman, S. T. (2000, January). Constant comparison method: A kaleidoscope of data [24 paragraphs]. *The Qualitative Report* [On-line serial], *4*(1/2). Available: http://www.nova.edu/ssss/QR/QR3-4/dye.html

one finds only proof of positive impact, then search specifically for proof of negative impact. By doing this, assists in the study's credibility and makes it less prone to bias.

By engaging in analysis, one can fully explore the data and discover credible and useful findings. These findings will be more robust and useful in strategic planning, program improvement, program recognition, and grant writing.

## Reporting Findings

In order to report on any findings, first analyze the data to provide a lens for ways to display the data in a coherent manner. Graphs can assist with this, but not all data can be represented with a graph. Consider also if any biases may have influenced the data and how that may impact the findings.

Finally, display results within a report. The report has four (or five) parts.

- The introduction introduces the evaluation question. This is to remind everyone as to the purpose behind this survey.
- The methodology section explains how the data was collected. This includes details on how the survey was promoted and/or distributed to the sample population.
- The results section includes all graphs and tables (make sure each is preceded by the question it pertains to). If there are open-ended questions, include all the replies to those questions in bullet points or paragraphs within this section.
- The next section – Discussion – is optional and only used for formal reports; this is where the data is discussed in depth. Include all possible biases and how the study corrected for them or how the biases influenced the data. Explore themes found in the data, and discuss recommendations for future strategies.
- If a formal report is not needed, skip the “Discussion” section and go to Conclusion. Restate the research question, summarize major points in the data, and cover any biases that may influence results.

Once the findings are reported, programs can then engage in discussions on how to use this data to improve their programs. See additional resources for further information on each step of the processes described thus far. For additional help on creating surveys and analyzing data in Excel, see section three of this guide. Good luck and have fun!

## Template for Qualitative Data Strategy

| **Organization:** | |
|---|---|
| **Direct Impacts** (and any secondary impacts you aim to evaluate) | **E4 Indicators for these impacts** (Qualitative only) |
| **Population(s)** (who you seek to impact) | **Sampling Strategy** (what is your stratified purposeful strategy for selecting interviewees) |
| **Interview Team** | **Timeline** |
| **Interview Protocol** (Recommended 3 sequences of outside-inside questions per dimension of the Heart Triangle)<br>Know → Believe<br><br>Do → Become<br><br>Feel → Love | |

# Section 3

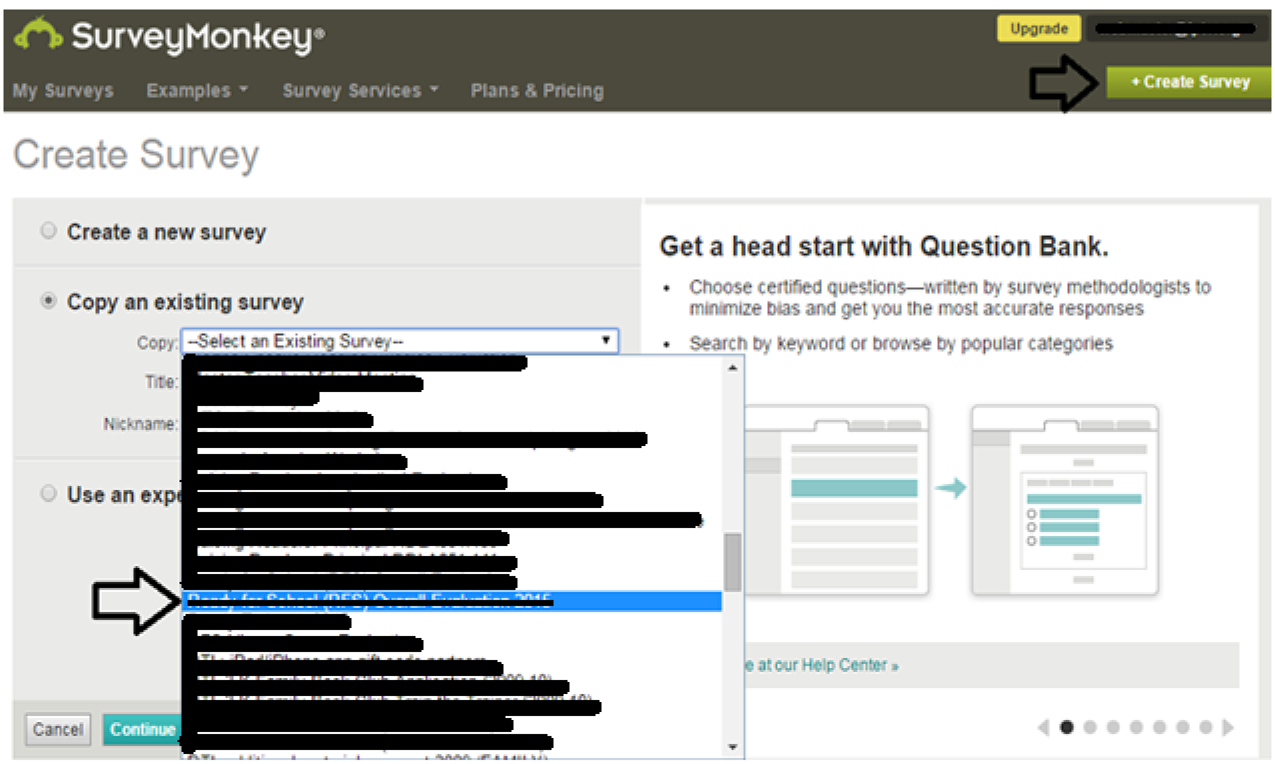
This section of the guide provides a step-by-step method on how to create a survey in Survey Monkey and methods of analyzing data in Excel. It does not provide advice on how to properly construct survey questions. See Section 1 for tips on designing survey questions.

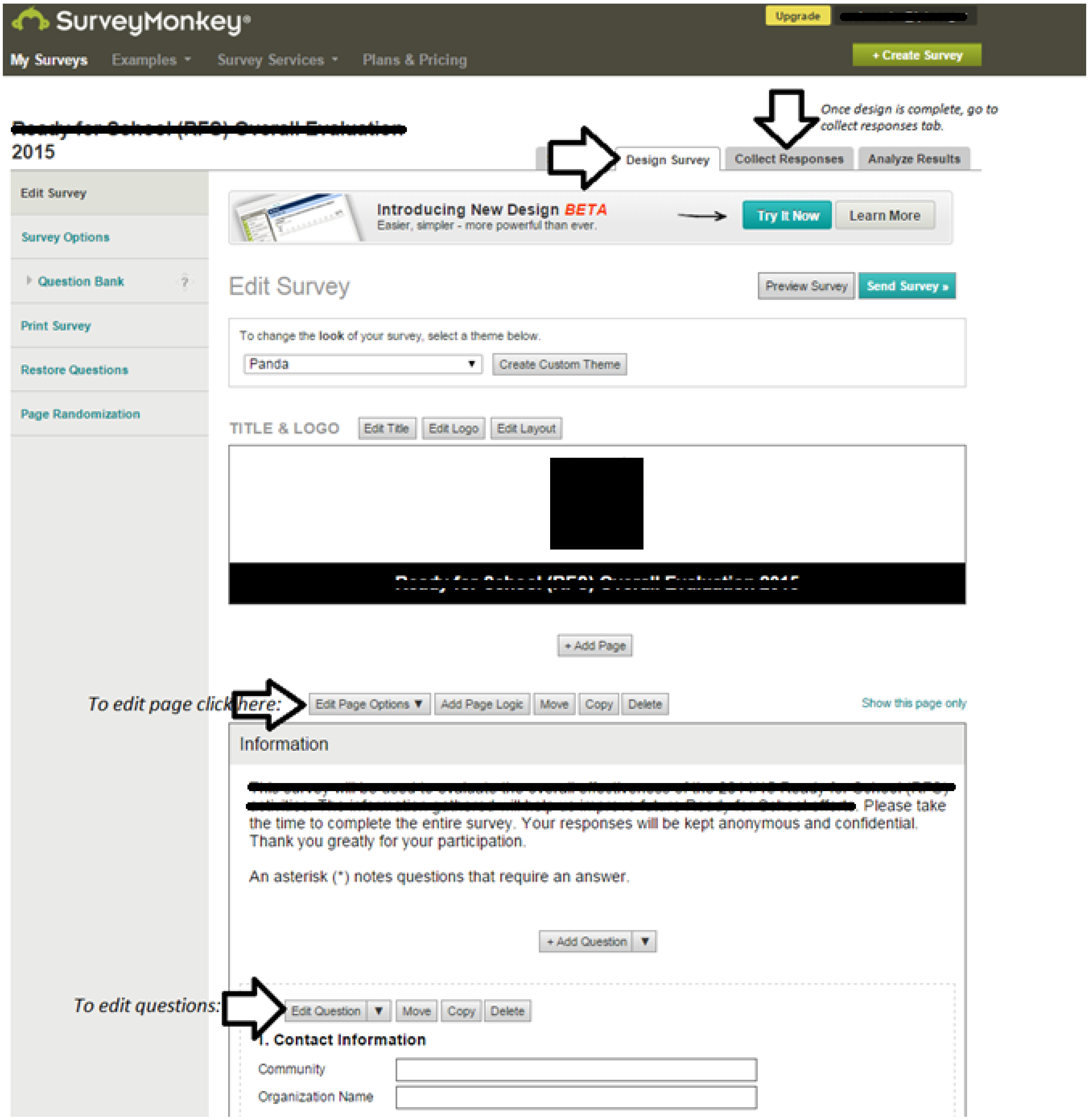
## How to Create a Survey in Survey Monkey

1. Log in to Survey Monkey using the following:

Username:
Password:

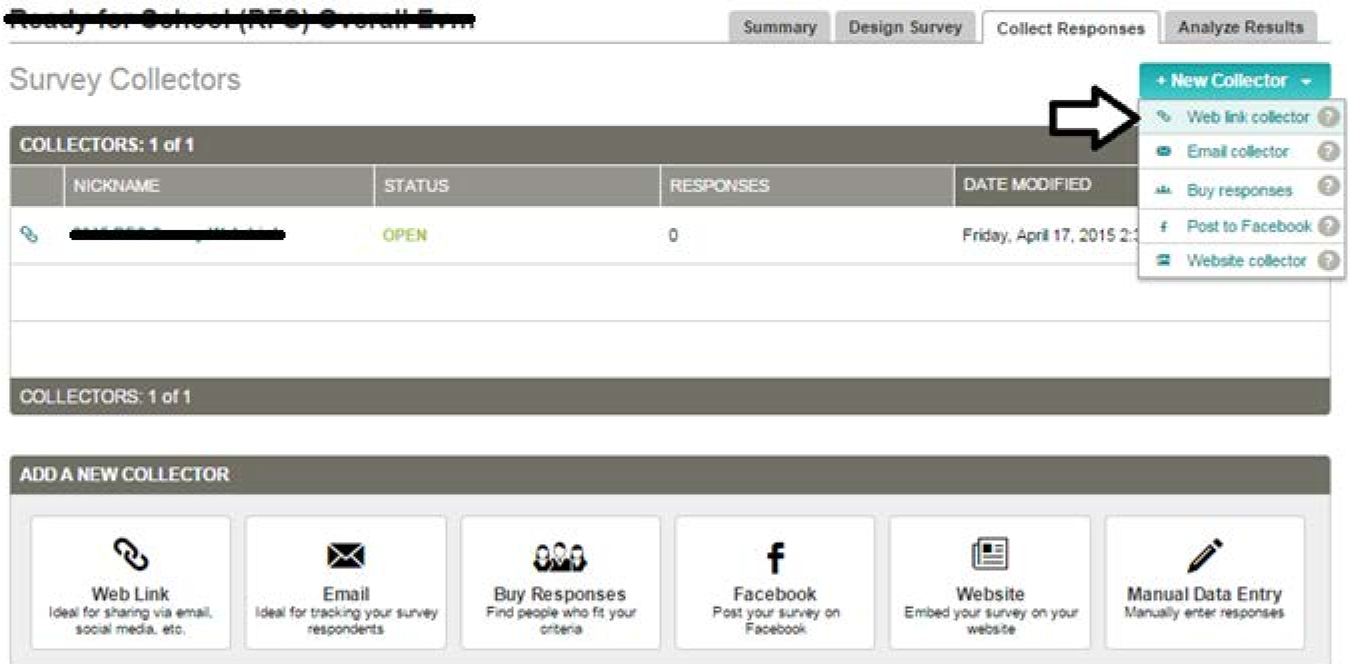
2. To build a new survey or copy from an old survey, follow these steps:
   i. Click on "Create Survey" button at the top of your home page.
   ii. Create a new survey. Include a title and select a category that fits the scope of the survey. Or one can use a pre-existing survey as a template: click on the "copy an existing survey."
   iii. A drop down box will appear. Select the desired survey. Once selected, this will populate the title. Alter the title as necessary for your new survey.
   iv. Hit Continue.
   v. Now the survey exists in the "design" tab. Here one can edit the pages and questions. Note, when editing the pages and questions, each are opened one at a time, and to save, hit the "save and close" button for each one.



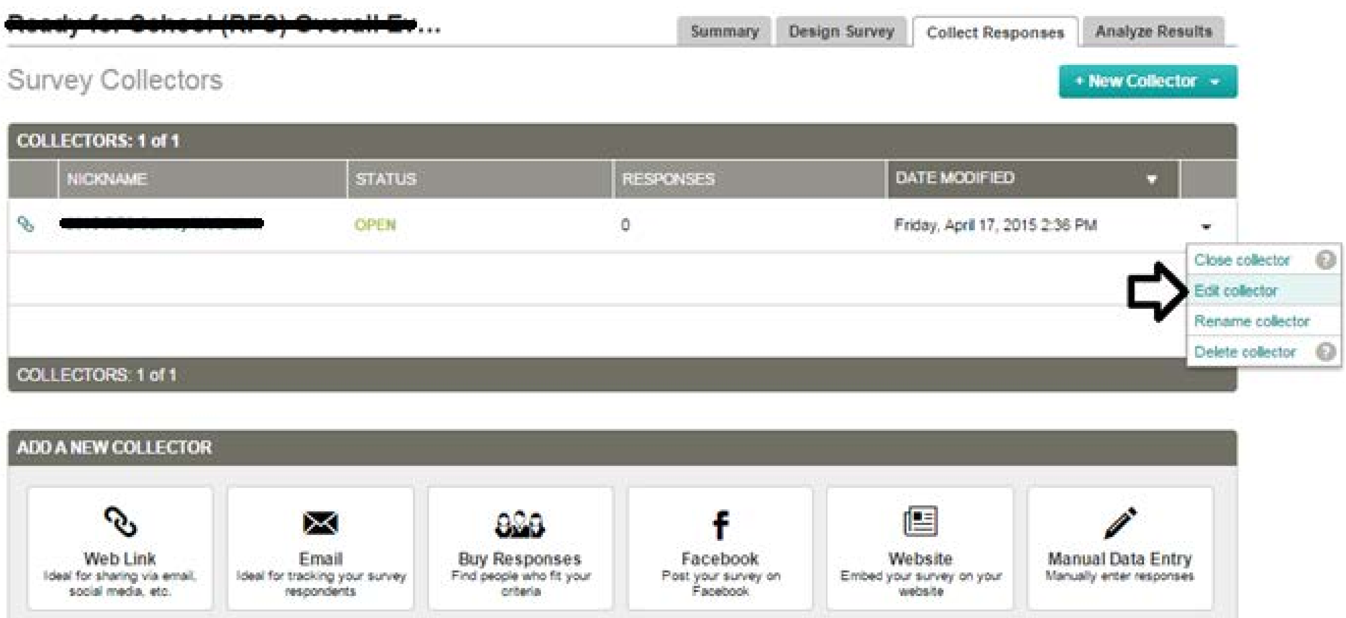


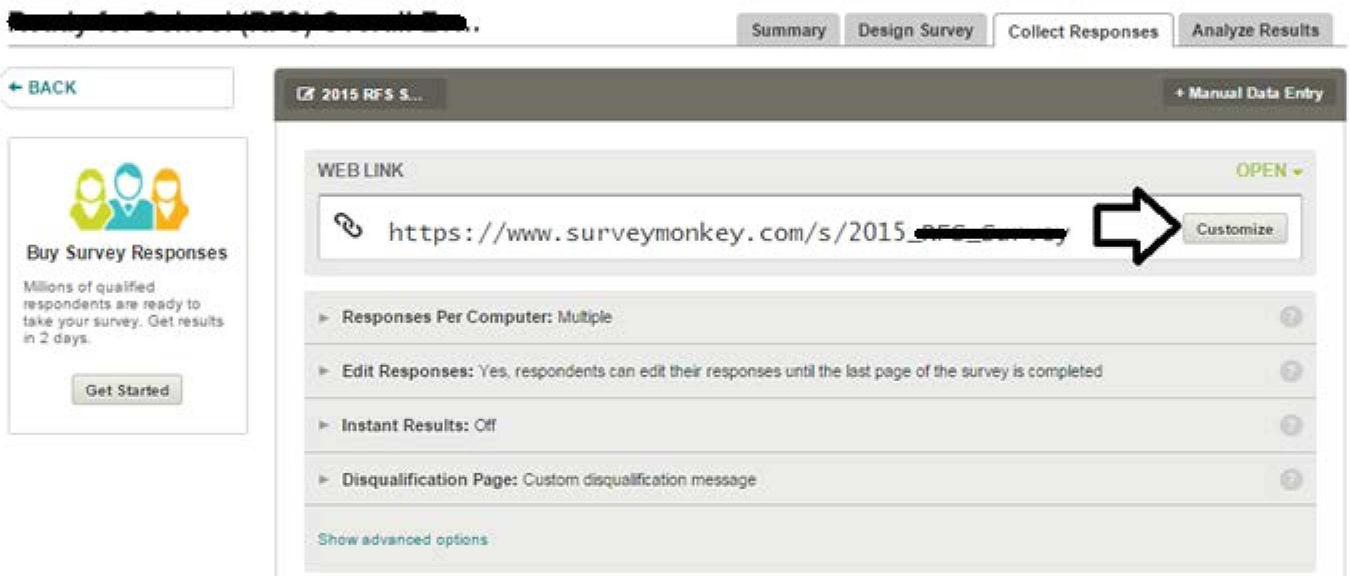

3. Once the survey is designed, a collector is needed. This is how the survey will be distributed to participants. Survey Monkey offers several different choices:
    i. a web link hosted by Survey Monkey that can be distributed in any medium,
    ii. email where the survey is within the email,
    iii. buying responses,
    iv. posting the survey to Facebook
    v. embedding within a website.

vi. It is possible to use more than one collector for a survey. Create a new collector in the Collector tab next to the Design tab. A web link is good enough collector for most surveys. For web links, the link itself can be altered. Use this year's date and the name of the survey in this customization link. This will make it easier to share the link.




***To edit a current collector:***






vii. Notice there is four drop down boxes with multiple options.

viii. Multiple responses per computer are good for manual entry of data and for kiosks or computer labs at libraries. If most of evaluation participants will use their own computers, then leave it at one response per computer.

ix. Allowing participants to edit their responses until they submit is up to the evaluation team.

x. There is no need for instant results. Examine the results in the Result Tab as the data comes in, or download this data in Results.

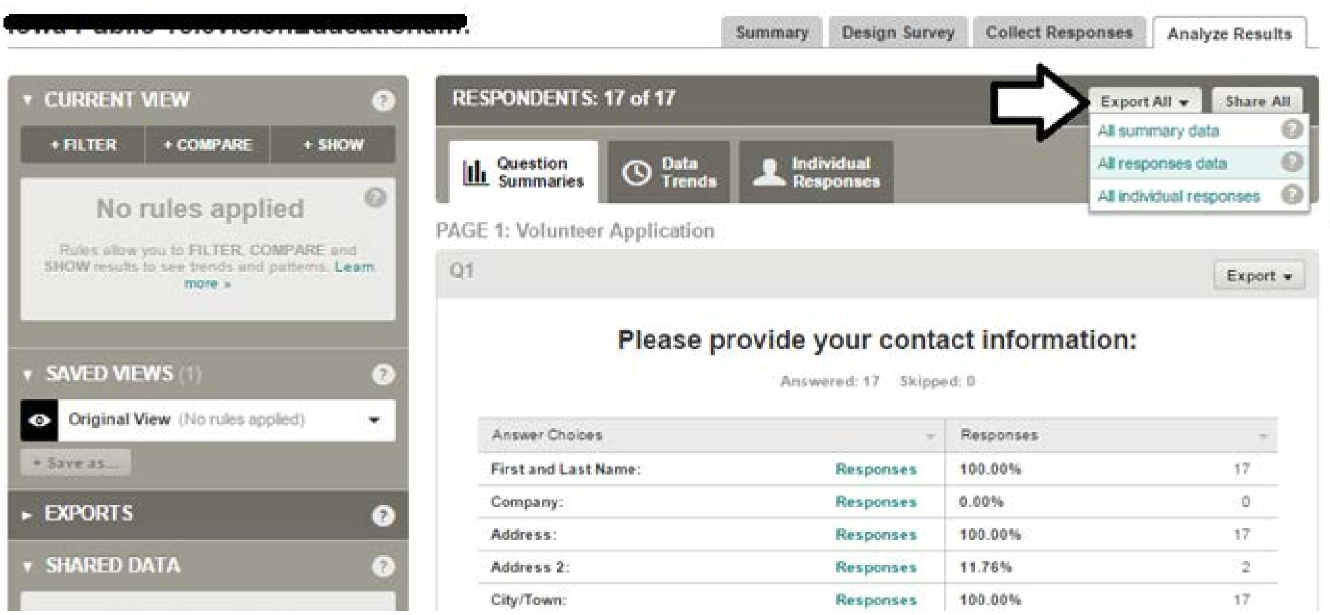
xi. The disqualification page is only for those respondents who don't meet survey qualifications. Most of the time, it won't be necessary to alter the default option for this.

4. Distribute survey to the sample through email or social media or posting the link to the program's website.
5. When determining how long to keep the survey open, it may be best to use a time period that matches the audience, survey platform, and evaluation timeline.. If it is an ongoing survey – such as signing up participants for a waiting list – then an end date is not necessary.

   i. For ongoing surveys, the primary concern is creating a new collector for each year (or month depending on the needs of the program). This will organize the data effectively.

6. Once the data collection time is over, close the survey by going to the Collector tab. Click on the "open" above the survey link, and select the "close" option.


7. Go to the Analyze Results Tab. There will be an option to "export" all data. Select the Excel Spreadsheet option.
   i. Export all responses (or individual responses) to Excel. Make sure the "condensed" option is selected for the columns. The "expanded" option can also be selected, but this will increase the size of the spreadsheet and add columns that are not always necessary.
   ii. Click Export.
   iii. A dialog box will appear saying it is ready for download. (Survey Monkey may send an email as well).
   iv. Open the download zip and open the Excel Spreadsheet folder. Ignore the "summary" data. The entire data set is in the "all responses data. Also ignore CSV, and select Excel version.
   v. Clean the data once it opens in Excel and save the spreadsheet . Cleaning the data involves deleting unnecessary information, standardizing the format of responses, and eliminating blank rows or columns. There are formulas within Excel that assist in cleaning the data. See Excel tips for more information on cleaning your data.



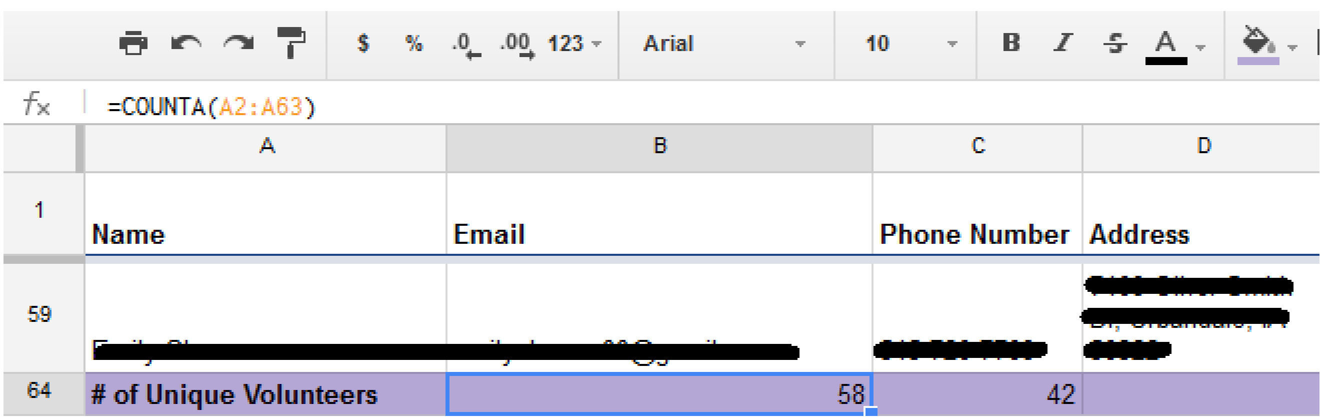
## Excel Tips

In the results tab, filter results based on question and answer, collector, completeness, time period, and respondent metadata. Next to filter is the compare option. This will compare questions and answers. Next is the show option, where only certain pages can be shown. All of these options are available in the left hand menu in the “current view” section. Each filer can be saved under “saved views."

Cleaning the data in Excel will involve taking out the response metadata, as it's often not necessary to know the IP address of each respondent. Often all that is needed is the survey questions and their answers, so cut all columns that don’t pertain to those. Survey Monkey already standardizes all answers to lower case, but if Survey Monkey is not used, then standardize all answers to be lower case. All numbers, dates, and time stamps should also be in the same format. This will make it easier to use formulas to quantify your data.

One way to change the data to lower case is through use of the "UPPER," "LOWER," and "PROPER" functions. Create a new column next to the data you wish to convert, then use "=LOWER()" and copy that down the entire column. This will convert the data. Next, cut the newly converted column and paste over the original column.[9]

Next,  tally up the answers using the “=countif()” formula or the “=counta()” formula. “Countif” formula counts specific words within that column. The specific words are set by the criterion included in the formula. “Counta” function only counts cells that have something written in it and skips over blank cells within that column. Below is a screenshot of the “counta” function.




To provide another example, tally all the “yes” replies to a question. To do this, type: =countif(C2:C50, “yes”). That will give a count of all the “yes” answers.

However, note that the count functions require the criterion to be written EXACTLY as it is spelled and punctuated within the data set. If a period is placed after the word in the dataset but not in the criterion, then the countif function may not recognize it. For example, “YES.” will not be recognized in the above countif example because it contains a period and is in all caps. Survey monkey standardizes all answers so that they are all lower case with no punctuation, so this shouldn’t be a problem.

[9] Microsoft Office Support Website (current as of March 2016): https://support.office.com/en-ie/article/Change-the-case-of-text-01481046-0fa7-4f3b-a693-496795a7a44d

Another important formula is the “=sum()” function to find the total responses for that question. The sum function only works with numbers. Use the numbers found in the “countif” and “sum” formulas to create graphs that depict the data.

If a primer is needed on creating tables or graphs (and to make them look colorful), then go to the Excel help forums for more information. This link is current as of March 2016: https://support.office.com/en-in/article/Create-a-chart-0baf399e-dd61-4e18-8a73-b3fd5d5680c2

There are numerous ways to analyze the data in excel, and often the best way to learn is to make a copy of the data, and try various formulas on the data sets.

Once the data is analyzed, return to the end of section 2 and read about how to report findings. For further assistance with evaluations, go to additional resources at the end of this guide.

## Additional Resources

**Overall Evaluation Resources:**

- HHS.gov's Program Manager's Guide**:**
  http://www.acf.hhs.gov/sites/default/files/opre/program_managers_guide_to_eval2010.pdf
- University of Wisconsin Extension:
  http://www.uwex.edu/ces/pdande/evaluation/index.html
- Community Tool Box from University of Kansas*:*
  http://ctb.ku.edu/en/table-of-contents/evaluate/evaluation/framework-for-evaluation/main
- Guide to Program Evaluation by American Academy of Pediatrics**:**
  http://mchb.hrsa.gov/programs/healthytomorrows/evaluatingpart2.pdf
- AmeriCorps VISTA Campus:
  http://www.vistacampus.gov/tags/program-evaluation
- Corporation for National and Community Service:
  http://www.nationalservice.gov/resources/evaluation
- Evaluation Standards:
  http://www.eval.org/p/cm/ld/fid=103
- University of Wisconsin Extension: Sources of Information:
  http://www.uwex.edu/ces/pdande/resources/pdf/Tipsheet11.pdf

**Logic Models:**

- University of Wisconsin Extension*:*
  http://www.uwex.edu/ces/pdande/evaluation/evallogicmodelexamples.html
- Community Tool Box:
  http://ctb.ku.edu/en/table-of-contents/overview/models-for-community-health-and-development/logic-model-development/main

**Overview of Qualitative Methods**:

- NSF.gov:
  http://www.nsf.gov/pubs/1997/nsf97153/chap_3.htm
- Steve Patty, Ph.D, Dialogues in Action:
  http://www.dialoguesinaction.com/evaluation/

**Focus Group Protocol Tips:**

- Trinity Duke:
  https://assessment.trinity.duke.edu/documents/How_to_Conduct_a_Focus_Group.pdf
- Annenberg Institute:
  http://annenberginstitute.org/sites/default/files/BTOProtocolStudents.pdf
- CDC.gov:
  http://www.cdc.gov/healthyyouth/evaluation/pdf/brief13.pdf

**Interviews**

- University of Arizona:
  http://ag.arizona.edu/sfcs/cyfernet/cyfar/Intervu5.htm
- CDC.gov:
  http://www.cdc.gov/healthyyouth/evaluation/pdf/brief17.pdf

**Data Analysis**

- Data Party – Journal of Extension:
  http://www.joe.org/joe/2013february/iw2.php
- Community Tool Box:
  http://ctb.ku.edu/en/table-of-contents/evaluate/evaluate-community-interventions/collect-analyze-data/main
- Sage Publication:
  http://www.sagepub.com/sites/default/files/upm-binaries/43454_10.pdf
- The Pell Institute:
  http://toolkit.pellinstitute.org/evaluation-guide/analyze/analyze-qualitative-data/
- Tips for Excel:
  http://www.excel-easy.com/data-analysis.html