Evaluation Toolkit

This toolkit is designed for anybody wanting to learn how to evaluate initiatives that support wellbeing. Any program, large or small, can use the tools here to help determine if their programs or services are doing what they intend to do.

Download the entire toolkit here.

The Toolkit is divided into three sections:

1) Preparing to Evaluate
2) Gathering Evaluation Data
3) Analyze & Share Your Findings

If you don't know where to begin, start at *Preparing to Evaluate* and go from there. If you know what you want to do, just click on the link below to go to the desired section.

If you want to ...

- Plan how to evaluate a project or program
- Learn more about data collection
- Survey participants about their experience
- Interview participants one-on-one or in a group
- Communicate about the program to others

If you want to learn more about evaluation in general visit:

- The Canadian Evaluation Society
- The Canadian Evaluation Society - Ontario Chapter
- Better Evaluation - A compendium of evaluation resources
- Program Evaluation Explained (Video)

Preparing to Evaluate

What's involved in planning your evaluation?

There are two key steps involved in preparing to evaluate your program:

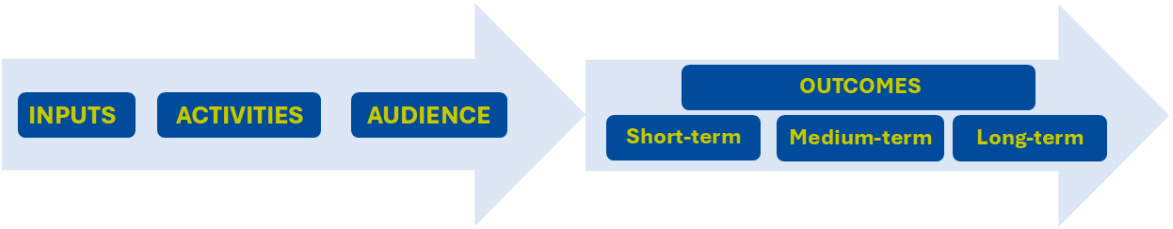
Step 1 - Describe your program: work with your team to create a program plan or logic model that describes what your program does, for whom, and the desired outcomes.

Step 2 - Create an evaluation plan: use the logic model to focus your evaluation questions, measures and approaches.

Step 1: Describe Your Program

A logic model is a common and effective way of describing a program. A logic model uses a linear framework of 'if - then' statements to lay out a program's processes and outcomes. For example: **If** we have these resources, **then** we carry out these activities with this audience, **then** we'll achieve these outcomes.

Creating a program logic model does not need to be complicated. In fact, it is advisable to start out with a short (2 – 3 hour) meeting to describe program activities and outcomes at a higher level. This meeting should include anybody involved in program design and delivery, for example front line staff, volunteers, and coordinators/managers. A **Tearless Logic Model** is a process that can be used to create a logic model with a team of people in a relatively quick and easy way. This facilitated process, guides a group through a series of questions describing various aspects of the program. At the end of the process, you will have a draft logic model with the following headings:



Step 2: Plan Your Evaluation

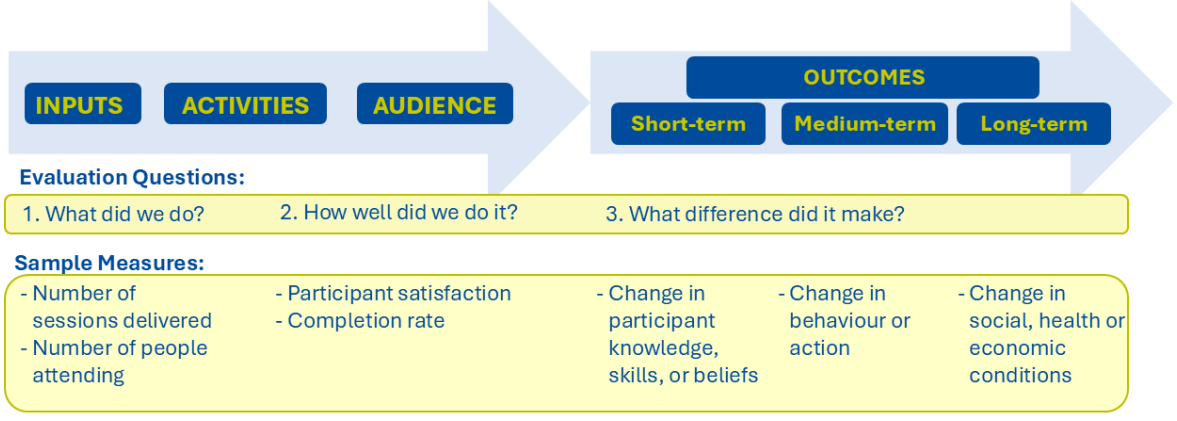
Having a logic model helps focus the evaluation on the key aspects of your program you want to measure and report on. Mark Friedman, author of "Trying Hard is Not Good Enough", proposes a framework for evaluating based on three key questions:

1) How much did you do?

2) How well did you do it?

3) What difference did it make?

Applying these three questions to the logic model provides a simple framework for evaluation planning:



Tools & Resources for Evaluation Planning

- The Tearless Logic Model Process
- Logic Model Template
- Sample Logic Model
- Evaluation Plan Template
- Sample Evaluation Plan

Learn More About Evaluation Planning

- Logic Models (3 minute video)
- Tearless Logic Model Website
- The Results-Based Accountability Guide
- Logic Modeling Methods in Program Evaluation, by Joy A. Frechtling. San Francisco, CA: Jossey-Bass, 2007.

Gathering Evaluation Data

Your evaluation plan will identify the different sources of information, or data, that you will need to gather for the evaluation. There are two main categories of evaluation data; quantitative (numeric) data and qualitative (text) data.

Quantitative data refers to data that can be summarized numerically. Examples of quantitative data include: the number of people attending a workshop; the number or percentage of people who completed the program; the average scores on a topic before and/or after a training session.

Qualitative data refers to textual or narrative data, including stories and lived experiences, that can be interpreted and summarized thematically. For example, this may include interview or focus group transcripts, open-ended survey responses, or storytelling approaches that center participant voice. These forms of data can be analyzed to identify common themes, concepts, or patterns, while respecting diverse ways of knowing and sharing knowledge.

Whether you plan to gather or use quantitative data, qualitative data, or a combination of both, you need to carefully design and test your data collection tools. There are many different data collection methods for gathering both types of data. This toolkit focuses on two common data collection methods; surveys and focus groups. In the “learn more” section at the bottom of this page, you will find links to resources about other data collection methods.

Tools & Resources for Gathering Data

The Canadian Campus Wellbeing Survey is a standardized survey that has been used by TMU's Recreation and Active Wellbeing Department as a benchmark to evaluate some of their programs. If your survey will include questions about wellbeing, you may want to use the Canadian Campus Wellbeing Survey as a template or guide. Your department may use other tools, or have standard sets of questions you ask program participants.

If you are planning to conduct a focus group, the Focus Group Planning Tip Sheet provides helpful, step-by-step instructions for preparing for a focus group. You can also adapt the focus group planning guide for one-on-one interviews.

Once you have decided on your data collection method or methods, use the Data Collection Planning Tool to plan your approach and process for gathering data.

Sample data collection tools: these examples use the sample Student Stress-Management Initiative described in the Preparing to Evaluate section of the toolkit as the basis for the tools' design.

- Sample Participant Survey
- Sample Group Discussion Guide

Learn More About Gathering Data

- Best Practices in Survey Design Checklist - Virginia Board for People with Disabilities
- Survey Design (5 minute video)
- Better Evaluation - Collect and Retrieve Data

Analyze & Share Your Findings

What's Involved In Analyzing and Sharing Your Findings?

Having gathered your data, you now need to summarize and share your findings. Summarizing data involves cleaning, reviewing and summarizing the results for patterns and key insights. Using and sharing your results is about making sure the information you gathered actually informs decisions and leads to improvement.

Quantitative (numeric) data can be summarized by calculating frequencies (how many times does each answer occur?) and percentages (what proportion of respondents answered this way?). A more in-depth analysis would compare frequencies and percentages between various groups of interests, for example by age category or gender identity. Other statistical methods for comparing or modelling data involve careful consideration about sample selection and groupings and should be approached with the support of a researcher or evaluator with expertise in this area.

Qualitative (textual) data includes open-ended survey responses, interview transcripts, focus group notes and written comments. Qualitative data is analyzed through thematic analysis to identify patterns of common ideas that appear across responses. The steps for qualitative analysis include: (1) carefully reading through all the text and highlighting key phrases or ideas (2) grouping similar ideas together to identify themes and (3) refining and summarizing the key themes along with illustrative quotes.

Once you have summarized your findings, think about who needs to know what, and why. Different audiences may need different levels of detail. For example, funders may want a clear summary of outcomes and impact, staff may want practical recommendations for improving services, and participants may appreciate a short, accessible summary of what was learned. Share findings in clear, plain language using visuals such as charts, tables, or short quotes to make the results easy to understand. Be honest about both strengths and areas for improvement, and highlight clear, realistic recommendations. The goal is not just to report information, but to support learning, accountability, and better decision-making.

Tools for Data Analysis and Reporting

- A template for theming qualitative data
- A sample communication plan for using and sharing results

Learn more about data analysis and reporting

- Basic Data Analysis Webinar
- Evaluation Reporting Guide