

Tools of the Trade: A CWIT Guide to Participatory Evaluation



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Introduction

Part 1: Participatory evaluation as a feminist research and learning practice

A short, feminist history of how this guide came into being.

This participatory evaluation guide is the product of many years of collaboration between two feminist organizations. **Chicago Women in Trades** is a Chicago-based non-profit organization that has been working for over 25 years to *increase the number of women in the skilled trades and other blue collar occupations and to eliminate the barriers that prohibit women from entering and remaining in non-traditional careers.* **The Center for Research on Women and Gender** at the University of Illinois at Chicago *promotes collaborative, multidisciplinary research related to women and gender and collaborates with Chicago organizations to assist them in developing evaluation and research aspects of their programs, in order to improve our understanding of the lives of women and the role of gender in society.*

♀ The CRWG mission and the philosophy of participatory evaluation

One of the central missions of the CRWG is to work collaboratively with community organizations and others to improve the understanding of the lives of women and girls and the role of gender in society. One of the ways the CRWG does this is through its Evaluation and Technical Assistance (ETA) program. The purpose of the ETA program is to provide gender centered, high quality, participatory evaluation services, including technical assistance related to research, for groups that impact the lives of diverse women and girls. While the CRWG's ETA program provides a range of evaluation and training services, it is particularly committed to partnerships and training based in participatory evaluation. The CRWG considers participatory evaluation to be a powerful tool for building the capacity of women and girls to become critical researchers of and advocates for their own experiences, programs, organizations, and communities.

✂ The CWIT mission and the philosophy of participatory evaluation

As an organization that integrates direct service (training), workforce development, advocacy and policy work, CWIT has always recognized the importance of program and policy evaluation. CWIT recognizes that program and policy evaluation is a crucial "tool of the trade" for any organization that seeks to enhance its sustainability. It provides a means of documentation and assessment that demonstrates, *in a systematic and thus reliable way*, to existing and potential funders -- and to other stakeholders -- that the organization's resources have been used well and that the program has been successful in meeting its objectives. At the same time, it demonstrates to funders and stakeholders that the organization is aware of its challenges and limitations and is committed to

meeting those challenges in order to improve its programs and policy work and thereby increase its successes.

When evaluation is understood as a means by which the organization's staff can document and critically reflect on the effectiveness of their own organizational practices, then it is also easily seen as a necessary "tool of the trade" for organizations that define themselves specifically as feminist and learning organizations.

While evaluation in general is key to an organization's ability to develop, improve, and adapt its programming, to maintain positive staff relationships, and to implement effective policy initiatives, the principles of participatory evaluation are especially compatible with feminist and learning organizations such as CWIT. These are only some of the ways in which participatory evaluation furthers the feminist principles of CWIT:

- participatory evaluation is "empowering," not only for CWIT's staff, but also for the women and girls whose lives and opportunities CWIT is committed to improving;
- participatory evaluation is based on principles of dialogue (communication) and respect, in which the relationships among stakeholders are considered salient, and the distinct knowledge and perspectives of various stakeholders are respected and taken into consideration in programming, planning, and policy work.
- participatory evaluation supports programming and policy work that is women/girl – centered.
- participatory evaluation supports CWIT's commitment to continuous improvement by involving staff and stakeholders in the process of learning about, reflecting upon, and transforming programs, policy initiatives, and potentially the organization itself.

Specific uses of participatory evaluation for CWIT

Beyond the philosophical relationship between CWIT's mission and participatory evaluation, there are specific goals CWIT has developed over the years for which participatory evaluation is a crucial component. It bears noting that CWIT has developed this guide because it recognizes that if evaluation is going to contribute meaningfully and substantively to these goals, it has to become a "tool of the trade" – that is, an integral part of CWIT's ongoing organizational practices. Below is a description of these goals as they relate to participatory evaluation:

Goal 1: Transforming CWIT from a reactive to a planning organization.

In fulfilling its goal of transformation from a reactive organization to a planning organization, ongoing participatory evaluation of all aspects of the organization is crucial.

Goal 2: Maintaining connections with past and present relationships

Through the combined emphases on documentation, reflection, and dialogue, participatory evaluation enhances the organization's connection to its history, its philosophical roots, and its relationship to its stakeholders and other partners.

Goal 3: CWIT as a model for other organizations

Thinking of program and policy development as in part a process of (self) assessment and refinement is compatible with and supports CWIT's mission of being a model or "template" for other organizations. This has two facets: first, that programs are pilots or models for other organizations and contexts; second, that programs are designed to respond to and adapt to changing circumstances. Evaluation is key to accomplishing both of these facets.

Goal 4: CWIT as part of a larger social movement for women's equality.

As this guide explains, participatory evaluation is a form of research. Because effective evaluation depends on thorough and ongoing documentation, it can serve as an archival tool that provides an critical (i.e. self-reflexive and contextualized) historical record of CWIT as an organization that changes and responds to the times. In this way participatory evaluation contributes to the ability of CWIT to see itself as part of a broader social and historical movement working for women's equality.

Why Develop a Guide to Evaluation?

As a trades organization, it is not surprising that CWIT understands the importance of having high quality tools that are used with consistency in the productive process. Given the centrality of high-quality participatory evaluation for so many facets of CWIT's mission and goals, the organization decided to develop this guide in collaboration with the CRWG in order to produce a customized tool that would facilitate the integration of participatory evaluation throughout CWIT's organizational practices.

Through the use of this guide and the thorough, ongoing integration of participatory evaluation, CWIT aims to produce consistency of across programs and over time in terms of quality of documentation and assessment practices; and a way of maintaining a record showing how CWIT has reflected upon its successes and challenges, sought to address those, and transformed its programs and organizations in the process.

Why Put this Evaluation Guide On-Line?

Given CWIT's and CRWG's shared goals of supporting the capacity of women and girls to research, document, and assess their experiences as workers, organizers, program developers, planners and policy makers, and in this way determine the nature of their own programs and organizations, CWIT and the CRWG agreed to make this evaluation guide available to other organizations by putting the guide on-line. The guide may be accessed free of charge through the CRWG website at: <http://www.uic.edu/depts/crwg/publications>.

Part 2: How to use this guide

This guide is designed to be both a teaching manual for your first evaluation and a resource you can return to for future evaluations. The guide takes you through each step of the evaluation process. Since the most effective evaluation occurs along with programming, the guide begins at the very beginning of program development, assisting you to write clear and realistic program objectives. The guide then leads you through the process of developing an evaluation plan, followed by the research you will carry out to gather information for your evaluation, continuing through the analysis of that information to writing a final evaluation report.

We suggest that first-time evaluators read the guide through in its entirety and then complete the exercises provided. In this way the guide will serve as a systematic and thorough introduction to conducting program evaluation. As you become more experienced with evaluation, you may continue to refer to the guide a resource as you return to familiar processes or begin to address new evaluation challenges.

Part 3: How the guide is organized

The guide is divided into three “stages” that will assist you as you plan and carry out your evaluation. While each stage builds upon the previous one, the sections are written in such a way that you can easily go back to previous stages for review, or use the information and resources in each stage independently of the others.

Stage 1 of the guide may be used for planning your program and the evaluation. To ensure sufficient time and resources are devoted to evaluation, planning for evaluation should begin during program planning. Stage 1 of the guide describes the construction of a work plan and an evaluation plan, both of which must be completed prior to conducting the evaluation. Examples and exercises are provided to add to your understanding of the components of a program work plan and evaluation plan. Corresponding worksheets are also included in a separate section.

Stage 2 of the guide describes individual data collection methods that you may choose to use in your evaluation. Stage 2 may be used while you are developing your evaluation plan to help you decide which methods to use. It may also be used as you carryout your evaluation, as you plan how you will actually collect the data.

Stage 3 of the guide offers a template and tips for writing an evaluation report. Funding organizations often have specific requirements for required reports. Stage 3 offers ideas for developing sections that are typically included in evaluation reports.

Appendices: In addition to the three stages, a set of appendices is included. The appendices offer additional assistance on particular topics that may be useful as you

plan or carry out your evaluation. The appendices are meant to supplement the content of the guide and provide additional information on important topics.

Worksheets: To help you plan your program and your evaluation, worksheets are provided at the back of the guide which correspond to the content of the guide. These worksheets offer templates for completing a work plan and evaluation plan for your program. The worksheets may be photocopied and used each time you plan an evaluation.

Resources: Depending on your program and experience with evaluation, you may decide you want more information about evaluation research or particular research methods. The list of print and web-based resources allows for further exploration of evaluation.

Part 4: Acknowledgements

This guide was produced thanks to the generous support of Chicago Women in Trades. We thank CWIT for their willingness to make this guide a public document by allowing us to place it on the web. In this way the resources it offers can be shared by other community organizations and agencies working to improve the lives of women and other groups working to improve their livelihoods. The authors would also like to thank the Center for Research on Women and Gender, University of Illinois at Chicago, for its institutional and administrative support of the production of the guide.