

## Introduction

Participants in this session will be able to:

1. Practice decision-making about focus, data collection, and analysis in evaluation
2. Identify ways to discuss evaluation changes with stakeholders to manage cost
3. Identify ways to get good data when organizational conditions change

## Foundational Concepts and Definitions

When conducting an evaluation, the amount and kind of data you need often depends upon the type of data collection needed to answer the evaluation's key questions. Always consider what question you need to answer before choosing a way to answer it.

**What do you really want to know?**

**What do you and your stakeholders care about? Are those things the same?**

**What are you required to report?**

**How good is the data?**

**How can you do evaluation cheaply and still have credible results?**

**Who – What – When – Where – Why – How – To What Degree**

## Definitions

### Metrics

“a system or standard of measurement”  
Can be measures: counts, perception data  
Can be other things: maps, stories  
Be open, use your imagination

### Levels & Types of Data

Nominal, Ordinal, Interval, Ratio  
Categorical, Continuous  
Qualitative, Quantitative

### Efficiency

Doing things right  
ROI  
Resource utilization  
Productivity  
Compliance

### Effectiveness

Doing the right things  
Satisfaction  
Engagement  
Performance change  
Stories

Type of Data	Issue	Common Tradeoffs
<b>Quantitative</b>	Fast and efficient to collect Less resource intensive Limited descriptive capabilities Anonymity possible	Limited explanatory value Can be misinterpreted Perceived as impersonal Breadth, not depth
<b>Qualitative</b>	Data takes time to collect and analyze Rich description <i>How</i> and <i>why</i> become accessible	Resource-intensive High-touch Depth, not breadth Confidentiality risks

“Good” data is:

- **Trustworthy** (i.e., valid and reliable, rigorously collected)
- **Representative** (minimizes bias, looks like reality, triangulated)
- **Actionable** (you can do something with it, answers “now what?”)

## “Good Enough” is NOT Enough

***Integrity***

Data has not been contaminated or breached/otherwise messed with  
People participating are protected from harm (Belmont Report, DoL Uniform Guidelines)

***Perishability***

Some data is time sensitive and doesn’t mean much the more time passes

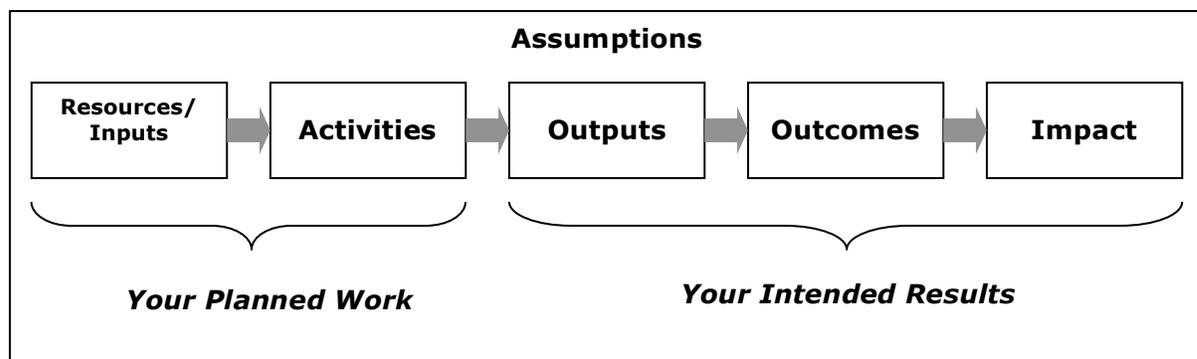
***Source Choice***

Who provides the data can determine its credibility, regardless of validity and reliability

***Limitations***

Don’t try to stretch the truth or spin the results – let the data speak  
Data is for explanation, interpretation is for justification

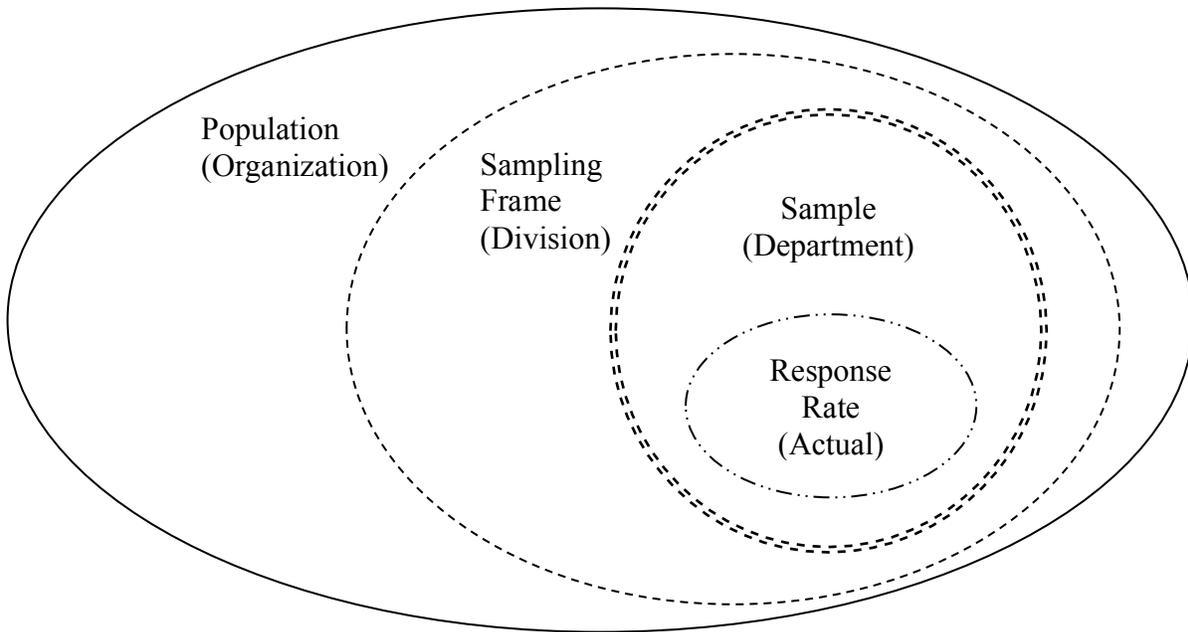
## Logic Models



## Sample Size Estimations

- Use a table of participant totals for confidence percentages (widely available on the Internet)
- Sample Size  $\neq$  Response Rate

**Example:** For a 95% confidence level for a survey, if your *population* size is 70 managers, (maybe only 68 are eligible to participate, which is your sampling frame) you need a *sample* of at least **59** to complete your survey (that's an 84% response rate if you can get it). If only 30 reply, you cannot be confident in your results with only a 43% response rate.



## Activity – Making Decisions

Making a decision about how to evaluate a Leadership Development program for senior leaders

Desired outcomes: Data that allows you to choose who belongs in the program and how successful the program is at providing a steady stream of qualified leaders whenever you need them.

- What metrics and types of data might you want?
- Is the data you want based on efficiency or effectiveness?
- Is it good data?
- What is your target response rate for the data or participation in the program? Does this fit the “good data” definition?

### What-if...

- HR tells you that you can't have or get the data you want?
- You're not allowed to talk to or get information from any of the participants? (you can only rely on course evaluations and participation data)
- The champion for the program left the company, and the new owner of the program is considering changing the vendor for the program's delivery?

## Cost Tradeoffs

Where you have to make tradeoffs:

Tradeoff Factor	Issues
<b>Time</b>	Limit how much data you collect (reduce breadth/depth) Focus more tightly on what you want to know (reduce scope) Reducing in breadth/depth and scope could result in limiting value also Going to fast or too slow could create value issues
<b>Scope</b>	Can result in loss of value if scope reduced too much (results have no meaning because too focused or too small a sample)
<b>Breadth/Depth</b>	You can have both too much <u>and</u> not enough
<b>Generalizability</b>	Demographics are important Think about what constitutes “representativeness” – you may need more or less data to achieve this, which affects costs
<b>Value</b>	This is defined by your stakeholders, not by how you collect data – if you know this, you can determine scope, breadth and depth
<b>Accuracy</b>	If you have inaccurate data, nothing else you do will matter

**Remember, there’s a difference between efficiency and effectiveness.**

**You may make the evaluation affordable and simultaneously make it useless.**

## My Notes:

## Data Collection Heuristics

These rules of thumb will help you in planning for common data collection costs.

<b>Document Review</b>	Minimum 10 hours (depending on the nature of the text)
<b>Interviews</b>	1:6 to 1:10 ratio – a 30-minute to 1 hour interview can take between 6-10 hours to coordinate, conduct, analyze, and report findings. Themes emerge in 8-12 interviews. You don't need to do 30 interviews for most corporate projects. Beware of politics – there can be reasons why you must interview everyone.
<b>Focus Groups</b>	1:10 to 1:15 ratio – a one-hour focus group can take between 10-15 hours to coordinate, conduct, analyze and report findings. Have 2 people conduct the focus group session – one to facilitate, one to take notes. Fast and efficient, rich data with minimal effort, inclusive without being intensive. Watch out for representativeness.
<b>Surveys</b>	Varies; design on paper and get approval first, uploading can be done in about 25 questions per hour. Plan on approximately 40 hours prework for custom surveys to get approval, get stakeholder review and buy in, create communication pieces, make changes to the design, and pilot test it pre-release. Analysis and reporting are additional time on the back end, and depends on whether you have qualitative or quantitative data.  Do you really need another survey?

## TRIANGULATE

Get data from multiple sources (databases, interviews, a focus group, maybe a survey too). It makes your data collection easier and your analysis more robust if you use several sources to corroborate your results.

### Activity 3

1. Get in groups of 3 or 4 (or partners, depending on the size of the group).
2. Pick an evaluation project you face in your organization.
3. Discuss the following:

Based on what you've learned in this session, how will you adjust your plan to engage your stakeholders in the conversation about cost and options for getting good data? What examples will you use to discuss tradeoffs?

### My Notes:

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## Resource List

- Adams, M. (2009). *Change your questions, change your life*. 2<sup>nd</sup> Ed. San Francisco: Berrett-Koehler.
- Binder, C. (2010). Measurement, evaluation, and research: Feedback for decision-making. In J. Moseley and J. Dessinger (Eds.), *Handbook of Improving Performance in the Workplace: Volume 3 – Measurement and evaluation*, 3-24.
- Dillman, D., Smyth, J., & Christian, L. (2009). *Internet, mail, and mixed-mode surveys: The tailored design method*. 3<sup>rd</sup> Ed. Hoboken, NJ: John Wiley & Sons.
- Dobrovolny, J., & Fuentes, S. (2008). Quantitative versus qualitative evaluation: A tool to decide which to use. *Performance Improvement*, 47 (4), 7-14. DOI: 10.1002/pfi.197
- Henry, G. (1990). *Practical sampling*. (Vol. 21). Newbury Park: Sage.
- Kellogg Foundation. (2001). *Logic Model Development Guide*. Access from: <http://www.wkkf.org>
- Kraemer, H.C., & Thiemann, S. (1987). *How many subjects?* Newbury Park, CA: Sage.
- Nardi, P. (2006). *Doing survey research: A guide to quantitative methods*. 2<sup>nd</sup> Ed. Boston: Pearson.
- Russ-Eft, D., & Preskill, H. (2009). *Evaluation in organizations: A systematic approach to enhancing learning, performance and change*. 2<sup>nd</sup> Ed. New York: Basic Books.

Free tools and resources: [www.eval.org](http://www.eval.org) (select Community>Public eLibrary from the top menu)

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