PEER EVALUATOR TRAINING PROGRAM – References and Resources

References adapted from the original Skills Online Evaluation Course with the permission of the Public Health Agency of Canada

Resources adapted from the REACH Online Evaluation Toolkit

Acknowledgements

Table of Contents

MODULE 1: Introduction to Evaluation

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Resources:

- Kellogg Evaluation Handbook – This handbook provides a framework for thinking about evaluation as a relevant and useful program tool. It was written primarily for project directors who have direct responsibility for the ongoing evaluation of W.K. Kellogg Foundation-funded projects but is a useful tool for any program or organization embarking on program evaluation.
- Innovation Network Evaluation Plan Workbook – Offers an introduction to the concepts and processes of program evaluation.
- Developing an Effective Evaluation Plan: Setting the Course for Effective Program Evaluation (CDC) – This workbook was developed by the Centers for Disease Control and Prevention's Office as part of a series of technical assistance workbooks for program managers and evaluators. The workbooks are intended to offer guidance and facilitate capacity building on a wide range of evaluation topics.
- University of Manitoba's Summer Institute in Program Evaluation – The Summer Institute in Program Evaluation brings together an inter-sectoral group of community-based practitioners and university students to exchange information about evaluation for improved planning and delivery. This is a link to the resource page for this course. Password to access this page is 'password'.
- Ontario Centre of Excellence for Child and Youth Mental Health: Program evaluation toolkit – This toolkit contains resources for planning, doing and using program evaluation. These worksheets can assist your team in focusing on what is important and feasible as you begin to formulate and implement your evaluation project. However, this toolkit is not designed as a stand-alone resource. If you are new to program evaluation, you may first want to refer to the Centre's evaluation resources including the online learning modules, "Planning, Doing and Using Evaluation", to gain a

better conceptual understanding of program evaluation. These modules are accessible from www.centrelearning.ca

- SkillsOnline.ca – Skills Enhancement for Public Health – Intro to Evaluation (online course $175) – Evidence based practice, which includes evaluation, is a cornerstone of public health. Public health practitioners have varying levels of engagement with evaluation from conducting or managing an evaluation to assessing, communicating and using evaluation findings. This module will introduce you to the major types and approaches of evaluation and stakeholder involvement. Learning activities focus on the steps of the evaluation process including logic model development, evaluation planning, data collection, and reporting. It aims to increase your evaluation literacy so that you can bring an enhanced understanding of the conduct of an evaluation to your work.
- Quality Action: Improving HIV Prevention in Europe – Quality Action is the EU-wide 'Joint Action on Improving Quality in HIV Prevention'. Quality Action aims to increase the effectiveness of HIV prevention in Europe by using practical Quality Assurance (QA) and Quality Improvement (QI) tools. Quality Action develops and adapts QA/ QI tools especially for use in HIV prevention.

MODULE 2: Types of Evaluations and Approaches

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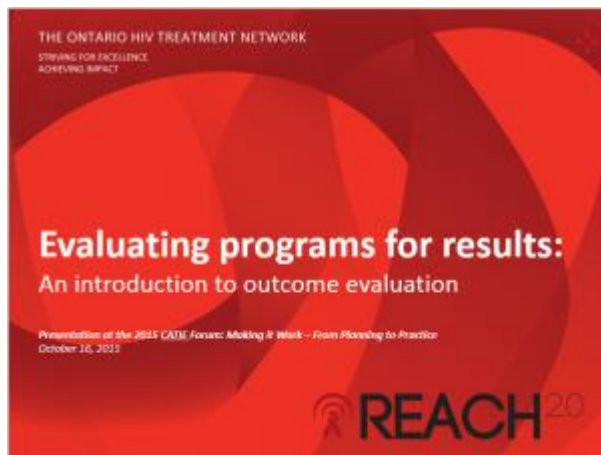Click4it: Unitar Learning and Training Wiki. Goal-Free Evaluation. 2011. (Accessed March 7, 2013).

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Resources:

- Types of Evaluation (CDC) – Once you've determined which program activities in your logic model should be evaluated, you can begin to identify the types of evaluation you can conduct.
- Developmental Evaluation (Better Evaluation) – Developmental Evaluation (DE) is an evaluation approach that can assist social innovators develop social change initiatives in complex or uncertain environments.
- Below is a presentation on Evaluating programs for results: An introduction to outcome evaluation by the Ontario HIV Treatment Network.

- Approaches (Better Evaluation) – Approaches (on this site) refer to an integrated set of options used to do some or all of the tasks involved in evaluation. Evaluation approaches have often been developed to address specific evaluation questions or challenges.

PARTICIPATORY AND COMMUNITY-BASED EVALUATION
- Participatory Evaluation. What is it? Why do it? What are the challenges? (Zukoski & Luluquisen) — Participatory Evaluation is a partnership approach to evaluation in which stakeholders actively engage in developing the evaluation and all phases of its implementation.
- Community Tool Box – Chapter 36, Section 6. Participatory Evaluation – A useful toolkit with an introduction, checklist, tools and PowerPoint on participatory evaluation.

- Community Based Research Tool Kit (PAN) – An online toolkit of tools and resources to help with the various stages of community-based research, from partnership building to knowledge translation.
- Savoir-faire et savoir-dire: Un guide d'évaluation communautaire (COCQ-SIDA) – This comprehensive guide to conducting community based evaluations includes tools for planning, conducting and reporting on the results of a community based evaluation. (French resource)

INTERNAL VS. EXTERNAL EVALUATION

A common question faced by organizations interested in evaluating one of their programs is whether the evaluation should be undertaken by their own staff or an external consultant. The resources provided in this section will provide you some useful information to help make this decision.

- A fundamental choice: Internal or External Evaluation? (Conley-Tyler) – A set of guidelines is offered to assist organisations in choosing between internal and external evaluation in each particular case
- Hiring an Evaluation Consultant (A Usable Knowledge White Paper) – Hiring consultants of any kind is always a challenge for a not-for-profit. This paper shares some thoughts about what to look for in an evaluation consultant and how to select and hire one for your next evaluation project.

MODULE 3: Engaging Stakeholders

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Resources:
- Get to Know Your Evaluation Stakeholders (Community Solutions) – You have identified your potential stakeholders. Now what? Get their input by asking some of the following questions…
- Identifying and Determining Involvement of Stakeholders (CDC) – Stakeholders are individuals and organizations that have an interest in or are affected by your evaluation and/or its results. Stakeholders provide a reality check on the appropriateness and feasibility of your evaluation questions, offer insight on and suggest methods to access the target populations, provide ongoing feedback and recommendations, and help make evaluation results actionable.

MODULE 4: Describe the Program

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Resources:

- What is Theory of Change? (Center for Theory of Change) – Theory of Change is essentially a comprehensive description and illustration of how and why a desired change is expected to happen in a particular context. Learn more on this site
- Theory of Change Examples (Centre for Theory of Change) – Take a look at examples of how programs or projects have mapped out their theory of change.
- Logic Model Workbook (Innovation Network) – A logic model is a commonly-used tool to clarify and depict a program within an organization. Its purpose is to graphically depict your program, initiative, project or even the sum total of all of your organization's work. It also serves as a foundation for program planning and evaluation.

- [W.K. Kellogg Foundation Logic Model Development Guide](#) (Kellogg Foundation) – In the pages of this guide, we hope to give staff of nonprofits and community members alike sufficient orientation to the underlying principles of "logic modeling" to use this tool to enhance their program planning, implementation, and dissemination activities.
- [Guide d'élaboration de modèles logiques de programme: Utiliser les modèles logiques pour coordonner la planification, l'action et l'évaluation](#) – A logic model is an evaluation tool, which clearly illustrates the components and activities of a program and logical links of these activities to the expected results. This document is an introductory guide to the basic principles and terminology related to logic models. (French resource)

MODULE 5: Evaluation Plans and Frameworks

References:

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Resources:

- Developing Evaluation Questions (CDC) – Evaluation questions help further focus your evaluation and should reflect the purpose of the evaluation as well as the priorities and needs of the stakeholders. You should develop questions you want the evaluation to answer about the program component/activity your are interested in evaluating.
- An Introduction to Indicators (UNAIDS) – This book is a common-sense introduction to indicators. It is designed to provide the basic information required to understand the components and the use of indicators in the monitoring and evaluation of the AIDS epidemic and response.
- Developing Evaluation Indicators – What is an Indicator? (CDC) – An indicator is a marker of accomplishment/progress. It is a specific, observable, and measurable accomplishment or change that shows the progress made toward achieving a specific output or outcome in your logic model or work plan.
- Les différents types d'évaluation (eval: Centre de ressourcs en évaluation) – Depending on the scope of the evaluation, an evaluation may be used to examine one or more activities, one or more projects or programs or to focus on the strategy or governance structure of an organization. (French resource)
- The Literature Review: A Few Tips On Conducting It (Dena Taylor at the Health Sciences Writing Centre, University of Toronto) – A resource that outlines what literature review is and a list of guiding questions to conduct a literature review.

MODULE 6: Evaluation and Ethics

References:

Canadian Evaluation Society. Ethics. n.d. (Accessed August 17, 2016).

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Tri-Council Policy Statement (TCPS). Ethical Conduct for Research Involving Humans. 2014.

Resources:

- Ethics by Canadian Evaluation Society outlines key ethical principles an evaluator should consider. A concise handout form is also available.
- Policy or legislative requirements often stipulate that research projects involving people or their health information must be reviewed by a Research Ethics Board (REB). This raises a number of questions. For example, what should be done with projects that are not considered research but involve people or their health information? Should quality improvement (QI) or program evaluation projects also be assessed for their risk to people? A pRoject Ethics Community Consensus Initiative (ARECCI), an initiative of Alberta Innovates – Health Solutions (AIHS), developed this four-step, web-based ARECCI Ethics Screening Tool to provide practical "on the ground" decision-support assistance to project leaders and teams as they grapple with these very complex questions. Content experts have developed the tool, and its context validity continues to be enhanced through focused implementation with experts and their projects.
- In addition, the ARECCI Network developed the ARECCI Ethics Guidelines for Quality Improvement and Evaluation to help project leaders and administrators manage ethics-related risk.

- Let's Get Ethical! Ethical Considerations in Program Evaluation — This module will support evaluators in understanding the importance of ethics when working with participants and increases their ability to identify key ethical standards and principles. It will also help evaluators with the application of ethics in an evaluation context.
    - Further resources under this online module:
        - Ethics in Evaluation – Supplementary Resources
        - Necessary and optional elements to include in a consent
- Ethical Issues in Evaluation — This PowerPoint presentation by Sandra Mathison from University of British Columbia explains a number issues and dilemmas evaluators may face in an evaluation (at various stages).
- ETHICS is a chapter in Designing for Results: Integrating Monitoring and Evaluation in Conflict Transformation Programs that discusses unethical practices and common ethical issues in *Protection of people, Freedom from political interference, and Quality data collection techniques.* It also discusses the differences in ethics of being an internal vs. an external evaluator.
- Tri-Council Policy Statement 2: Ethical Conduct for Research Involving Humans (2014) is key, official guidelines developed by Canada's three federal research agencies to promote the ethical conduct of research involving humans. Although research and evaluation are not quite the same, principles that guide ethical conducts of a researcher are similar to those of an evaluator.

MODULE 7: Data Collection

References:

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Art at the Center. Early Childhood Art Focus Group. 2003. (Accessed October 11, 2012).

Boyce, C., and Neale, P. Conducting In-Depth Interviews: A Guide for Designing and Conducting In-Depth Interviews for Evaluation Input. Pathfinder International Tool Series: Monitoring and Evaluation - 2. Watertown, MA: Pathfinder International, 2006. (Accessed April 26, 2012).

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USAID. Performance Monitoring and Evaluation Tips: Using Direct Observation Techniques. 1996. (Accessed October 11, 2012).

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Resources:

- Collect and/or Retrieve Data (Better Evaluation) – This task focuses on ways to collect and/or retrieve data about activities, results, context and other factors. It is important to consider the type of information you want to gather from your participants and the ways you will analyze that information, before you choose your option.
- Selecting Data collection Methods (CDC) – Once you have clear and focused evaluation questions, the next step is to decide from where/ whom you will get the data to answer your evaluation questions. Example data sources include documents, individuals, and observations. Then you can decide on which data collection methods to use and should consider the following when selecting your methods.
- Data Collection Methods for Program Evaluation: Interviews (CDC) – This brief is about interviewing as a data collection method for evaluation. This brief includes a basic overview of the interview

method; when to use it; how to plan and conduct it; and its advantages and disadvantages. This brief focuses on interviewing individuals.

- Data Collection Methods for Program Evaluation: Focus Groups (CDC) – This brief is about focus groups as a data collection method for evaluation. This brief includes a basic overview of focus groups; when to use them; how to plan and conduct them; and their advantages and disadvantages.
- Data Collection Methods for Program Evaluation: Questionnaires (CDC) – This brief is about questionnaires as a data collection method for evaluation. The brief includes a basic overview of questionnaires; when to use them; how to plan and develop them; and their advantages and disadvantages.
- Data Collection Methods for Evaluation: Document Review (CDC) – This brief describes document review as a data collection method for evaluation. It includes a basic overview of document review; when to use it; how to plan and conduct it; and its advantages and disadvantages.
- Data Collection Methods for Program Evaluation: Observation (CDC) – This brief is about observation as a data collection method for evaluation. It includes a basic overview of observation; when to use it; how to plan and conduct it; and its advantages and disadvantages.
- Collecting Evaluation Data: Surveys (University of Wisconsin-Extension) – This manual is written to help community-based educators improve their practice with survey development.
- Sample (Better Evaluation) – This webpage can help you in the sample process, in which you are deciding from who or what you are collecting data. The three clusters of sample options (i.e. probability, purposive and convenience) are outlined along with further resources on each of them.
- Conducting In-Depth Interviews: A Guide for Designing and Conducting In-Depth Interviews for Evaluation Input – This concise guide is a great tool for in-depth interviews. It outlines what in-depth interviews are and when to use them as data collection tools. It also tells you about the advantages of using in-depth interviews before taking you through the process on how to design and conduct them.
- How to do a research interview – This 18-minute video demonstrates two interviews – one poor and one good, to help the audience understand how to understand interviews in social science research. The narrator also provides tips on how to be a good interviewer.
- University Without Walls has great online modules on how to conduct Focus Groups, Indigenous Storytelling, and Participant Observation.
- Early Childhood Art Focus Group – Using art in data collection method, such as focus group, can be helpful for various individuals, including those with creative minds and those who enjoy alternative ways to express their thoughts and experiences. This resource provides an example on how to use art in data collection – a group of children play with clay, a process through which expression, observation, and reflection take place.

- [The Centre for Graphic Facilitation](#) – Graphic facilitation is another creative way to collect data. The discussions held during this type of facilitation are recorded as a graphic rather than as written notes.
- [Open Space Institute of Canada](#) – Open space is an innovative approach to more creative and productive meetings. While there are no agendas or tables, all issues are addressed and communication is improved. Check out this resource to find out more about open spaces and whether they are appropriate for your evaluation needs.
- [World Café](#) – World cafés are efficient and effective methods to hold large group discussions. This site outlines how world cafes operate and points to additional resources on this tool.
- [How to Make a Mind Map](#) – this YouTube video teaches viewers the basics on how to create a mind map.

MODULE 8: Analysis

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Ontario Centre of Excellence for Child and Youth Mental Health. [Introduction to Qualitative and Quantitative Methods and Analysis](#). n.d. (Accessed February 23, 2017).

Public Profit. [Dabbling in the Data](#). n.d. (Accessed February 23, 2017).

Resources:

- WISE 2.0 (Claremont Graduate University) – A great source for evaluators to learn statistical concepts.
- Analyzing *Quantitative* Data for Evaluation (CDC Evaluation Briefs) – A quick and dirty guide on planning and conducting *quantitative* data analysis for evaluation. Also outlines the advantages and disadvantages of using quantitative data.
- Analyzing *Qualitative* Data for Evaluation (CDC Evaluation Briefs) – A succinct guide on how to plan and conduct *qualitative* data analysis for evaluation. Also outlines the advantages and disadvantages of using quantitative data.
- Participatory analysis, monitoring and evaluation for fishing communities (Food and Agriculture Organization of the United Nations) – Don't let this title deter you. This manual provides information on developing participatory monitoring and evaluation, including a whole chapter on analysis to get your analytic brain going. This chapter provides guidance on making decisions around how to analyze the information.
- Visual Learner Statistics – Are you a visual learner? Then this is a great resource to help you understand and learn the statistical terminologies, measures and tools/tests.
- Participatory Analysis – Expanding Stakeholder Involvement in Evaluation – Using three case studies, this resource illustrate three different approaches to involving stakeholders in the data analysis and interpretation of evaluation.
- Participatory Data Analysis – This post, published on eXtension Evaluation Community, provides a brief description of what participatory data analysis is and outlines justifications around why participatory data analysis should be used.
- "A Participatory Group Process to Analyze Qualitative Data" *by Susan F. Jackson. Progress in Community Health Partnerships: Research, Education, and Action* 2.2 (2008). A journal article that describes participatory qualitative data analysis processes used in three projects with marginalized women in Ontario, Canada. For the article abstract, please click here.
- "The DEPICT model for participatory qualitative health promotion research analysis piloted in Canada, Zambia and South Africa" *by Sarah Flicker and Stephanie A. Nixon.* Health Promotion International 30.3 (2015): 616-624 – This journal article outlines the six steps of the DEPICT model, a collaborative and democratic approach to qualitative data analysis that enhances rigour through stakeholder inclusion.
- Free Resources on Evaluation & Program Sustainability – Various resources on evaluation, program sustainability, needs assessment, presentations, and collaboration are provided by Kylie Hutchinson, including resources on data parties!

MODULE 9: Sharing and Using Findings from the Evaluation

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Resources:

WRITING REPORTS & RECOMMENDATIONS

- Report and Support Use of Findings (Better Evaluation) – Develop and present findings in ways that are useful for the intended users of the evaluation, and support them to make use of them.
- Knowledge Translation (KT) Planning Primer (PHAC) – The KT Planning Primer is a tool designed to support active forms of knowledge dissemination and exchange. It has three parts. Diagram: a visual overview of the process of making knowledge matter. Worksheet: a series of steps to guide you through the process. User Guide, Appendices and References: questions and resources to help you complete the Worksheet, and beyond.
- Preparing an Evaluation Report (CDC) – This *Brief* provides a general outline for an evaluation report that can be adapted to present evaluation results and is tailored to address the questions and concerns of different audiences.
- Art and Architecture of Writing Evaluation Reports (Treasury Board of Canada Secretariat) – This is a comprehensive course on evaluation report writing. The course offers tools on self-assessment and writing styles, as well as exercises on writing various components of the evaluation report.
- Evaluation Report Layout Checklist (Stephanie Evergreen) – A quick checklist to assess various elements of an evaluation report. The checklist also provides best practices to enhance evaluation reports.

DEVELOPING A COMMUNICATIONS PLAN

- Developing a Communications Plan (Evaluation Toolkit) – Before beginning a communications effort, develop a communications plan, which is a set of strategies that describe how you intend to communicate the results of the evaluation.

DATA VISUALIZATION

- Visualize Data (Better Evaluation) – Data visualisation is the process of representing data graphically in order to identify trends and patterns that would otherwise be unclear or difficult to discern. Data visualization serves two purposes: to bring clarity during analysis and to communicate.
- Data Visualization Checklist (Stephanie Evergreen) – This checklist is meant to be used as a guide for the development of high impact data visualizations.
- Top Ten Slide Tips (Garr Reynolds) – This resource outlines 10 tips on how to best utilize PowerPoint slides as an effective tool to share data.
- A YouTube Video – Approximately a minute and a half long video on what not to do on PowerPoint Slides!
- Slide Design Guidelines – A set of guidelines on how to design a slide deck that best supports audience's needs.

OTHER RESOURCES:

- Evergreen Data — A great blog by Stephanie Evergreen that provides great advice on how to improve the way we report our findings, how to communicate findings more clearly and how to use data visualization tools to increase engagement with our work.
- Data Analysis + Visualization – A blog by Ann K. Emery, who is an independent consultant who specializes in data visualization and data analysis and writes a great blog with lots of great data visualization and excel tips.
- Pinterest Board: Better Evaluation Reporting – Tools and resources for more effective reporting in monitoring and evaluation curated by www.communitysolutions.ca.
- Communicating Evaluation Findings – A blog post that summarizes some of the tools, methods and tips to enhance evaluation reporting and communication.

MODULE 10: Evaluation Work Planning and Management

References:
REACH 2.0. Evaluation Toolkit Workbook. 2016. (Accessed December 9, 2016).

Resources:
- Evaluation Work Plan (Better Evaluation) – An evaluation work plan involves the development of clear timeframes, deliverables and milestones. It should state who is accountable for different phases and activities of the evaluation and include risk management strategies and flexibility to deal with unforseen events without compromising the timeframe or methodology.
- Making a Gantt Chart with Excel (Better Evaluation) – A detailed how-to video tutorial on creating a Gantt chart using Microsoft Excel.
- A Checklist for Developing and Evaluating Evaluation Budgets – A detailed checklist that can assist evaluators with creating an evaluation budget. This checklist will also facilitate some thinking around potential issues when developing a budget.
- Evaluation Toolkit: Sample Budget (Better Evaluation) – This is a straightforward budget example that lists costs associated with four basic expenditure categories: staffing, materials and supplies, equipment and travel.
- Manage Evaluation (Better Evaluation) – A useful guide in setting up mechanisms to manage your evaluation plan. Management tasks can include, making decisions around who to engage as stakeholders, establishing decision making processes, deciding who will conduct the evaluation, securing resources, determining ethical and quality standards, etc.

- [Guide d'évaluation de project à l'intention des organismes sans but lucrative: Méthodes et étapes foundametales pour procéder à l'évaluation de projects](#) – This guide was designed to help charities and non-profit organizations conduct accurate and relevant project evaluations, and to present and use the results effectively. The main purpose is to help organizations who want to evaluate their own projects and to integrate evaluation into their project management and strategic development. (French resource)