Organization & Program Evaluation

Brea M. Heidelberg, PhD

Program Director, Entertainment & Arts Management

Drexel University

Founder & Principal

ISO Arts Consulting

Who Am I?

Brea M. Heidelberg

Black, Cisgendered She/Her

Hometown: Pittsburgh

Arts Background: Dance

Educational Background:

Economics & International Studies (BA & BS)

Human Resources (MS)

Arts Policy & Administration (MA & PhD)

Current Occupations: Assistant Professor & Consultant

Why Conduct Evaluations?

The overall purpose of organization & program evaluation is to provide information to decisionmakers to help them:

- Improve quality
- Increase organizational knowledge
- Prioritize resources
- Align outcomes with organizational priorities
- Improve accountability
- Provide information for Advocacy

Development Evaluation

Conducted during the program development process

- What are the right set of strategies for this program

- What is the best design?

- What are appropriate goals?

- What and whose needs is this program addressing?

- What processes should be in place to make implementation effective?

- What criteria or standards are being used to design this program?

Formative Evaluation

Conducted to aid in program or process improvement in house – focused on implementation

- How well is the program being implemented?
- What are the barriers to implementation?
- How effective are the program's activites?
- How might we increase engagement or participation?
- How prepared are staff?
- How might implementation be refined?
- What's working?

Summative Evaluation

Conducted to determine the merit or worth of a program – goals oriented evaluation

- Did the program meet its goals?

- Were the results worth the cost?

- Are parts of the program reproducible?

Impact Evaluation

Commonly completed for funders and external bodies – focused on the overall impact of a program on stakeholders
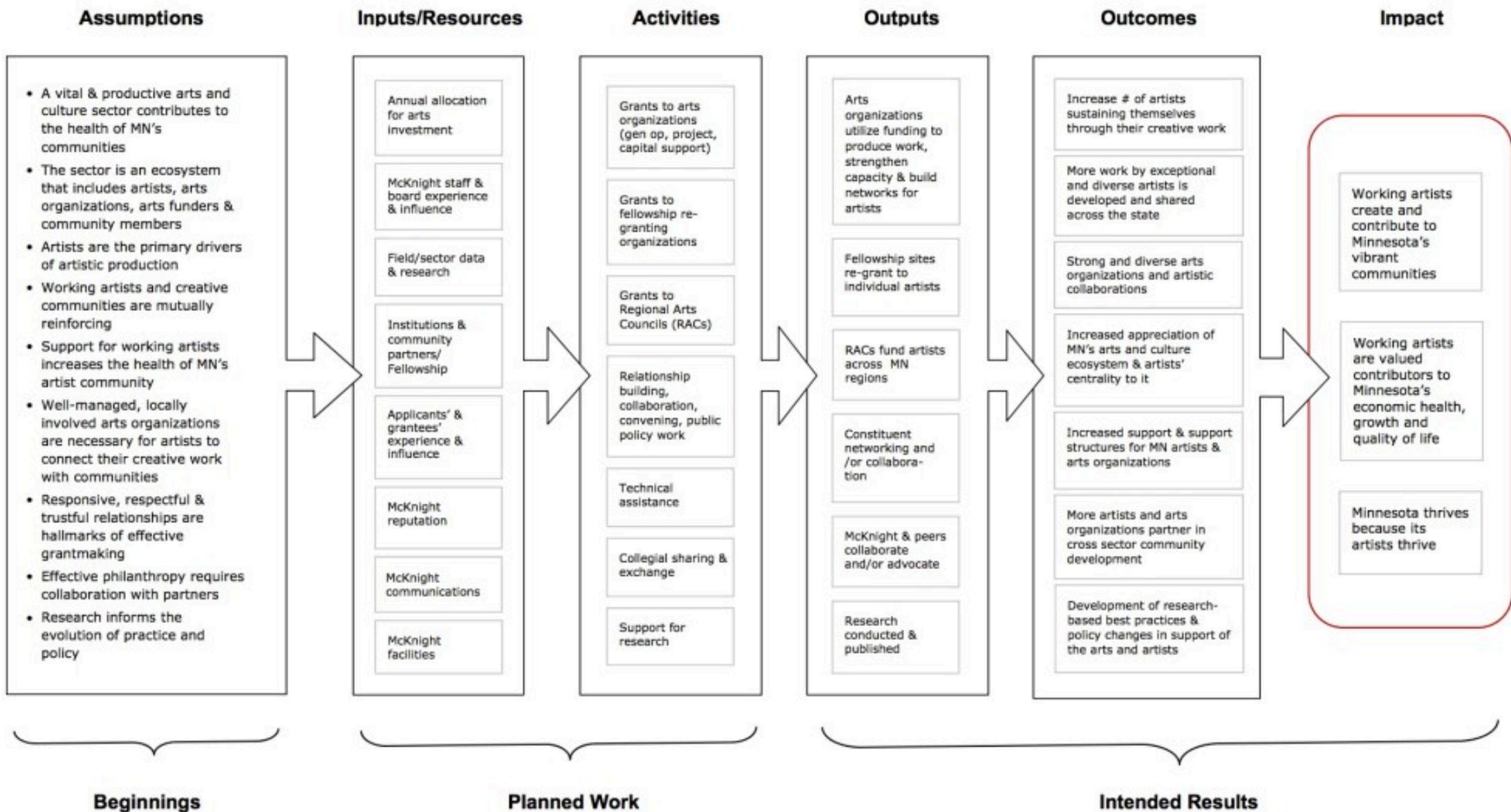
Starting with Logic Models

Program logic models are a tool that is useful when developing evaluation questions

Having a clear understanding of program elements is key to formulating evaluation questions and beginning to think about what will be needed to answer them

Multiple levels of staff need to be involved in this process

The McKnight Foundation: Arts Program Logic Model

Assumptions	Inputs/Resources	Activities	Outputs	Outcomes	Impact
• A vital & productive arts and culture sector contributes to the health of MN's communities	Annual allocation for arts investment	Grants to arts organizations (gen op, project, capital support)	Arts organizations utilize funding to produce work, strengthen capacity & build networks for artists	Increase # of artists sustaining themselves through their creative work	Working artists create and contribute to Minnesota's vibrant communities
• The sector is an ecosystem that includes artists, arts organizations, arts funders & community members	McKnight staff & board experience & influence	Grants to fellowship re-granting organizations		More work by exceptional and diverse artists is developed and shared across the state	
• Artists are the primary drivers of artistic production	Field/sector data & research		Fellowship sites re-grant to individual artists	Strong and diverse arts organizations and artistic collaborations	Working artists are valued contributors to Minnesota's economic health, growth and quality of life
• Working artists and creative communities are mutually reinforcing	Institutions & community partners/ Fellowship	Grants to Regional Arts Councils (RACs)	RACs fund artists across MN regions	Increased appreciation of MN's arts and culture ecosystem & artists' centrality to it	
• Support for working artists increases the health of MN's artist community	Applicants' & grantees' experience & influence	Relationship building, collaboration, convening, public policy work		Increased support & support structures for MN artists & arts organizations	
• Well-managed, locally involved arts organizations are necessary for artists to connect their creative work with communities	McKnight reputation	Technical assistance	Constituent networking and /or collaboration		Minnesota thrives because its artists thrive
• Responsive, respectful & trustful relationships are hallmarks of effective grantmaking			McKnight & peers collaborate and/or advocate	More artists and arts organizations partner in cross sector community development	
• Effective philanthropy requires collaboration with partners	McKnight communications	Collegial sharing & exchange			
• Research informs the evolution of practice and policy	McKnight facilities	Support for research	Research conducted & published	Development of research-based best practices & policy changes in support of the arts and artists	

Beginnings — **Planned Work** — **Intended Results**

THE McKNIGHT FOUNDATION

Logic Models & Guiding Questions

Who - Who was your strategy initiative, or program intended to benefit?

What - What was the effort intended to do? What was the context within which the effort took place and how could it have affected its implementation and outcomes?

When - When did activities take place? When did the desired changes start to occur?
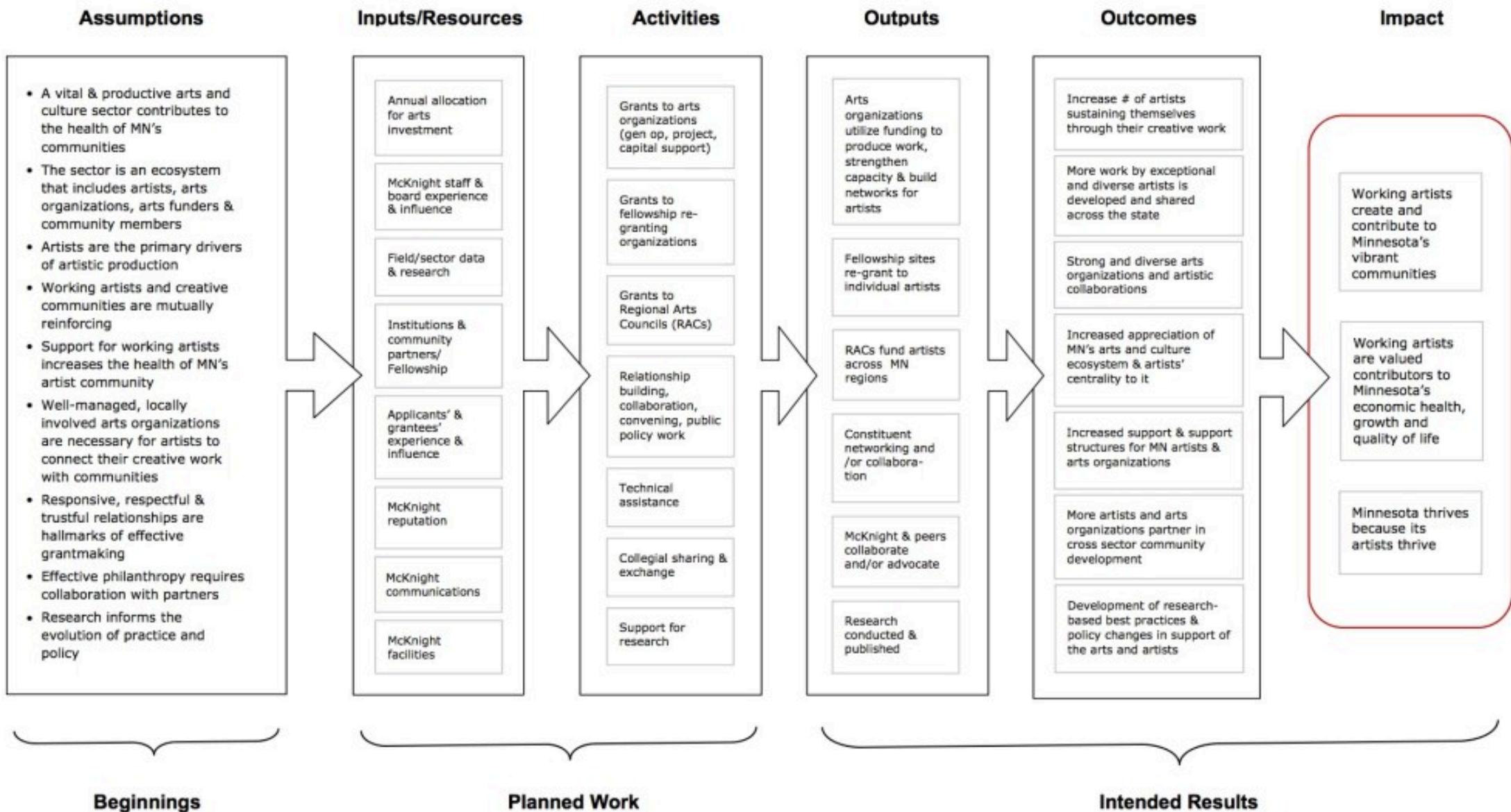
Why - Why is the effort important to your organization or community? Why might it be important to people in other organizations or communities?

How - How is the effort intended to affect the desired changes or bring about the desired outcomes?

Developing Evaluation Questions

- Remember: you want to provide information that will help decision makers

- The case of the "but what abouts?"

- The importance of being useful

- Simple is best

The McKnight Foundation: Arts Program Logic Model

Assumptions	Inputs/Resources	Activities	Outputs	Outcomes	Impact
• A vital & productive arts and culture sector contributes to the health of MN's communities • The sector is an ecosystem that includes artists, arts organizations, arts funders & community members • Artists are the primary drivers of artistic production • Working artists and creative communities are mutually reinforcing • Support for working artists increases the health of MN's artist community • Well-managed, locally involved arts organizations are necessary for artists to connect their creative work with communities • Responsive, respectful & trustful relationships are hallmarks of effective grantmaking • Effective philanthropy requires collaboration with partners • Research informs the evolution of practice and policy	Annual allocation for arts investment McKnight staff & board experience & influence Field/sector data & research Institutions & community partners/ Fellowship Applicants' & grantees' experience & influence McKnight reputation McKnight communications McKnight facilities	Grants to arts organizations (gen op, project, capital support) Grants to fellowship re-granting organizations Grants to Regional Arts Councils (RACs) Relationship building, collaboration, convening, public policy work Technical assistance Collegial sharing & exchange Support for research	Arts organizations utilize funding to produce work, strengthen capacity & build networks for artists Fellowship sites re-grant to individual artists RACs fund artists across MN regions Constituent networking and/or collaboration McKnight & peers collaborate and/or advocate Research conducted & published	Increase # of artists sustaining themselves through their creative work More work by exceptional and diverse artists is developed and shared across the state Strong and diverse arts organizations and artistic collaborations Increased appreciation of MN's arts and culture ecosystem & artists' centrality to it Increased support & support structures for MN artists & arts organizations More artists and arts organizations partner in cross sector community development Development of research-based best practices & policy changes in support of the arts and artists	Working artists create and contribute to Minnesota's vibrant communities Working artists are valued contributors to Minnesota's economic health, growth and quality of life Minnesota thrives because its artists thrive

Beginnings   **Planned Work**   **Intended Results**

SMART Approaches

Specific outputs and outcomes clearly state the issue of focus, target group and timeframe.

Measurable outputs and outcomes are ones where you can clearly assess the change that has occurred among the people impacted by the effort.

Achievable outputs and outcomes take into account the scale and scope of outcomes that can be achieved based on time and resources available.

Relevant outputs and outcomes (immediate, intermediate and long-term) work toward your desired change in an incremental manner.

Time-specific outputs and outcomes mean that the expected timeframe for changes should be clear and realistic.

Working Toward SMART Evaluations

Not so great

- We want to diversify our audience

- We want to increase applicant diversity

- We want to diversify our programming

Better

- We want to build a relationship with the Latinx community next to our building

- We want to create more equitable recruitment and selection processes

- We want to assess the representation needs of the communities we serve

Answering Evaluation Questions

- **Outputs** are direct products of activities and may include types, levels and targets of services to be delivered by the strategy, initiative or program.

- **Outcomes** are the immediate, intermediate and long-term changes or benefits that you will need to document. These outcomes should be the same ones identified in the logic model.

- **Indicators** are markers of progress toward the change you hope to make with your strategy, initiative or program.

- **Measures of change** are values - quantitative and qualitative - that can be used to assess whether the progress was made.

- **Data collection methods** are the strategies for collecting data. This may include quantitative methods, such as conducting surveys or analyzing existing data, or qualitative methods, such as conducting interviews or a document analysis.

- **Data sources** are the locations from which (e.g., national database, program survey), or people (e.g., program participants) from whom, you will obtain the data.

- **Data collection frequency** is how often you plan to collect data.

Data Collection

- What is the purpose of the evaluation?

- What are your potential data sources?

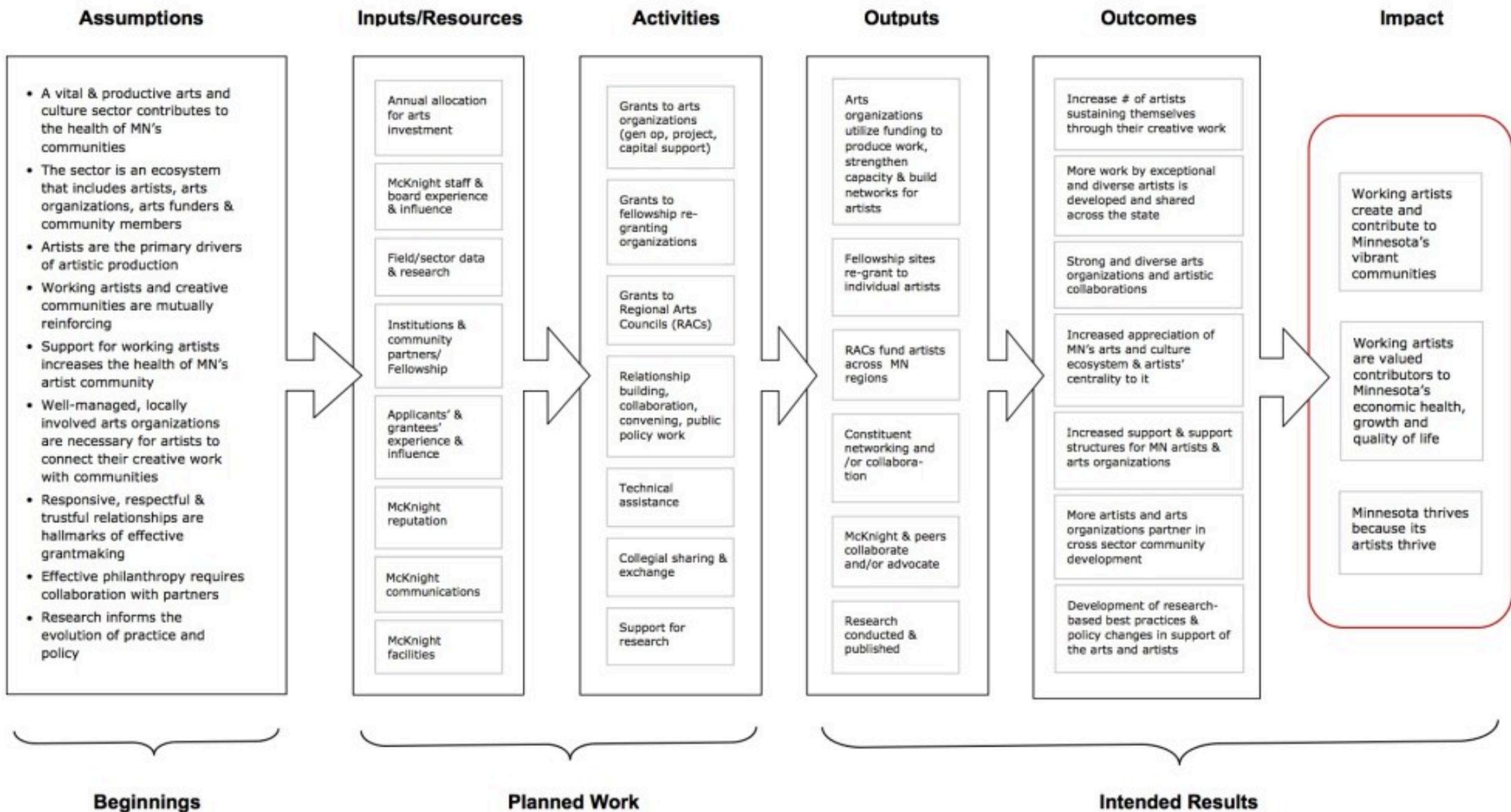- What is the timing of data collection?

Data Collection

Quantitative

Surveys

Tests & Assessments

Attendance Records

Activity Logs

Qualitative

Interviews

Focus Groups

The McKnight Foundation: Arts Program Logic Model

Assumptions

- A vital & productive arts and culture sector contributes to the health of MN's communities
- The sector is an ecosystem that includes artists, arts organizations, arts funders & community members
- Artists are the primary drivers of artistic production
- Working artists and creative communities are mutually reinforcing
- Support for working artists increases the health of MN's artist community
- Well-managed, locally involved arts organizations are necessary for artists to connect their creative work with communities
- Responsive, respectful & trustful relationships are hallmarks of effective grantmaking
- Effective philanthropy requires collaboration with partners
- Research informs the evolution of practice and policy

Inputs/Resources

- Annual allocation for arts investment
- McKnight staff & board experience & influence
- Field/sector data & research
- Institutions & community partners/ Fellowship
- Applicants' & grantees' experience & influence
- McKnight reputation
- McKnight communications
- McKnight facilities

Activities

- Grants to arts organizations (gen op, project, capital support)
- Grants to fellowship re-granting organizations
- Grants to Regional Arts Councils (RACs)
- Relationship building, collaboration, convening, public policy work
- Technical assistance
- Collegial sharing & exchange
- Support for research

Outputs

- Arts organizations utilize funding to produce work, strengthen capacity & build networks for artists
- Fellowship sites re-grant to individual artists
- RACs fund artists across MN regions
- Constituent networking and/or collaboration
- McKnight & peers collaborate and/or advocate
- Research conducted & published

Outcomes

- Increase # of artists sustaining themselves through their creative work
- More work by exceptional and diverse artists is developed and shared across the state
- Strong and diverse arts organizations and artistic collaborations
- Increased appreciation of MN's arts and culture ecosystem & artists' centrality to it
- Increased support & support structures for MN artists & arts organizations
- More artists and arts organizations partner in cross sector community development
- Development of research-based best practices & policy changes in support of the arts and artists

Impact

- Working artists create and contribute to Minnesota's vibrant communities
- Working artists are valued contributors to Minnesota's economic health, growth and quality of life
- Minnesota thrives because its artists thrive

Beginnings   **Planned Work**   **Intended Results**

Watch out for

- Bias in evaluation questions and methods
- Interesting versus useful
- Evaluation "noise"
- Can we also figure out. . .
  - Ripple effects of changing evaluations midstream

Data Collection Considerations

- Not be invested in getting positive or negative answers from respondents and thus be compelled to sway the respondent.

- Not be someone a participant feels compelled to please (e.g., someone who has power to provide or withhold service).

- Have the skills to interact respectfully with respondents (e.g., not "talk down" to people) and have the humility to recognize that they do not know everything there is to know about another group of people, especially if they come from a different cultural background (e.g., don't assume that everyone greets each other with a handshake or a hug).

- Be able to follow instructions and protocols consistently.

- Be discreet and not share any of the information provided by one respondent with another respondent or with people other than the evaluation team.

Equitable Data Collection

- Their past experiences with researchers and evaluators (e.g., is this a community that has been studied before by all sorts of research or evaluation groups).

- Logistical and other challenges they face if they have to travel to another location for an interview or focus group (e.g., they have to take two buses to get there, they don't have money for bus fare, they need someone to watch their children while attending the focus group).

- Cultural differences that could cause discomfort (e.g., women from some cultures are not allowed to be left alone to talk to male data collectors; undocumented immigrants may be afraid to speak to anyone they don't know; some words, phrases and gestures may be disrespectful in another culture).

- Language differences that could cause discomfort and misunderstandings (e.g., is an interpreter needed, will the interpreter keep the information he or she hears confidential, is the translation accurate and appropriate for that particular cultural group).

- Literacy level, which could cause discomfort and embarrassment if someone cannot read or write well.

- Framing of findings within context to not perpetuate stereotypes or suggest that the victims are to be blamed for their situations.

Anonymous or Confidential?

- Anonymity requires that you and your evaluator do not know who the participants are. For instance, you don't ask respondents to put their names in a survey or identify themselves in a focus group.

- Confidentiality means that you and your evaluator know who the participants are, but you don't link any of the answers to the respondent. Any information you have that contains the person's name or personal information must be kept in a locked drawer or stored in a password-protected electronic file.

Consent

- What you are asking them to do
- The benefits and risks of their participation
- Who will see the data and how the data will be used
- How much time it will take for them to answer the questions
- How their participation is voluntary and they can decline or stop in the middle of the process if it makes them uncomfortable

Evaluation Use

- Lack of use is one of the biggest problems in evaluation
  - Evaluations are conducted – but the results are ignored and/or not incorporated back into the organization's processes

- Types of evaluation use include:
  - Instrumental use
  - Conceptual use
  - Symbolic use
  - Process use

- Encouraging use throughout the organization is an important part of the process

Sharing Evaluation Results

- There are many ways to share results, your method should be determined by the stakeholder group:
  - Why are you sharing the information with them?
  - What would be most accessible?
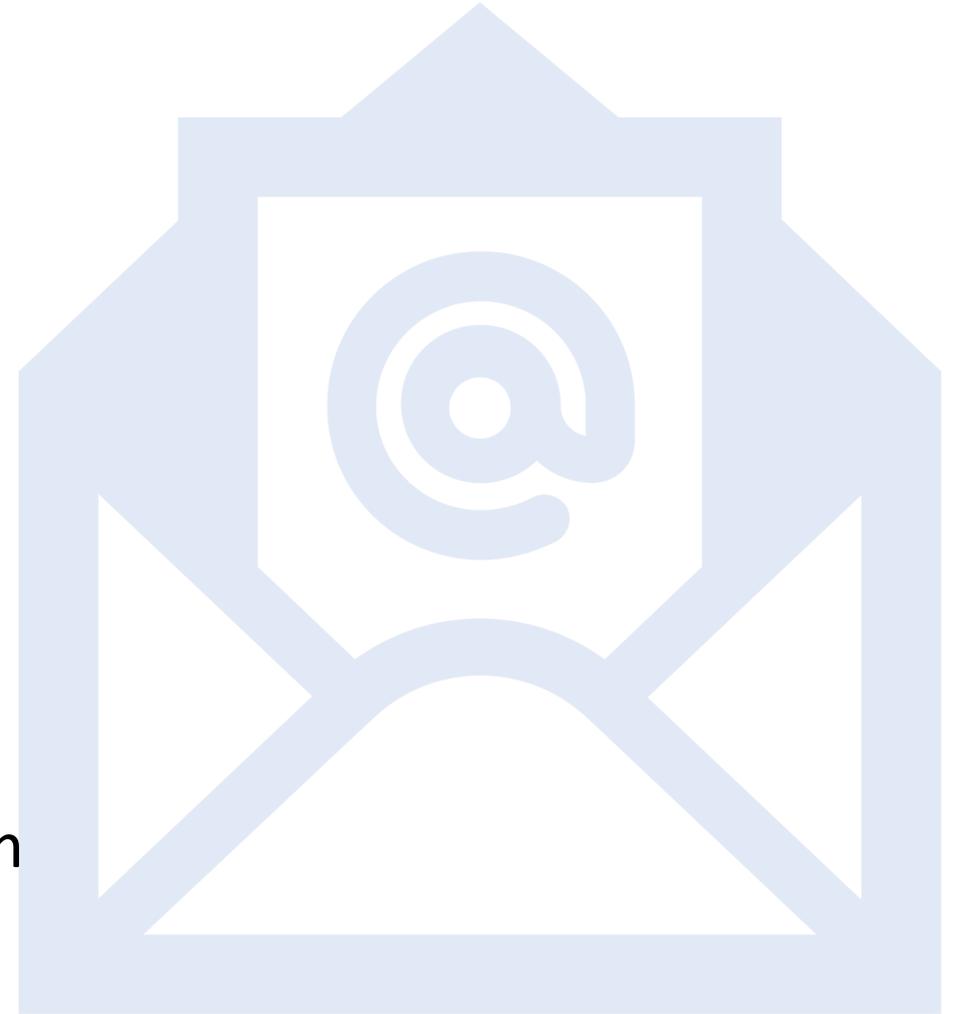 - What information do they need?
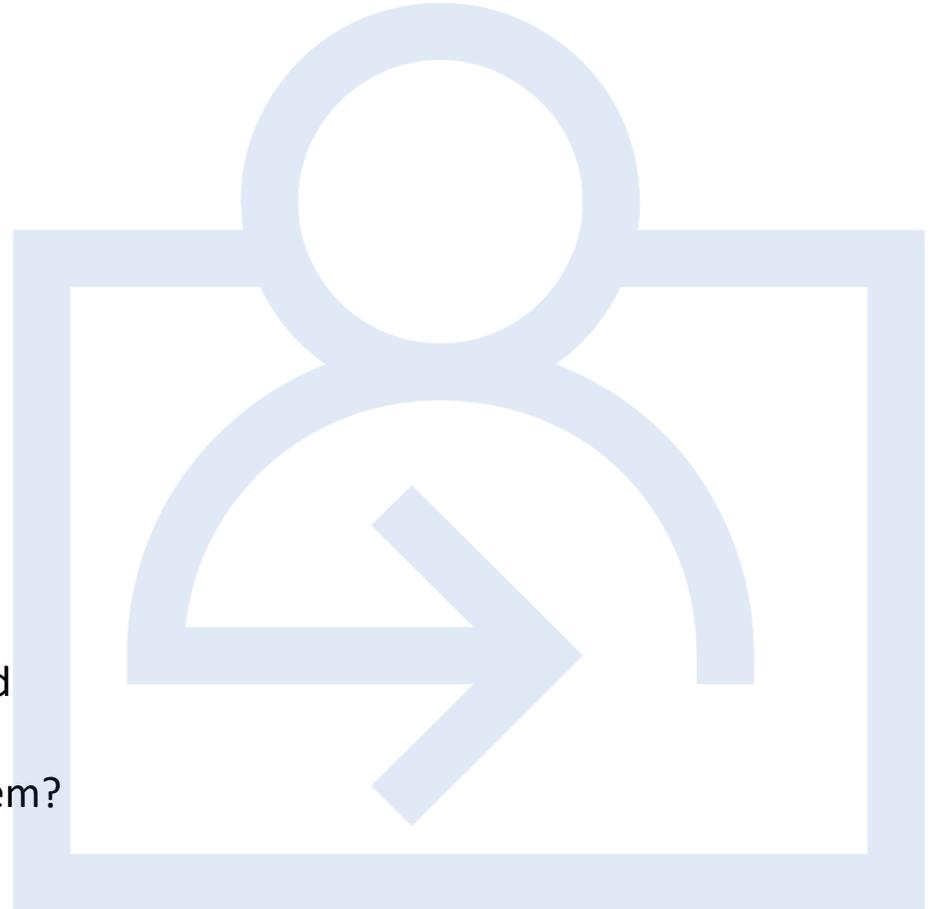
Thank You!

Brea M. Heidelberg

bheidelberg@isoartsconsulting.com

For additional information

American Evaluation Association: eval.org

This is a one stop shop for readings, resources, learning videos and a wealth of sources about successful evaluation practices.