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"TIERS": Tool for Intra-agency Evaluation Resource Sharing

Managing thoughtful allocation of evaluation resources at nonprofits

AEA Conference 2014 | *Demonstration Session 1065* | *Oct 15, 6:15 PM to 7:00 PM*

WHO THIS TOOL IS FOR

Nonprofit agencies – especially large multi-services with multiple stakeholders asking for data of varying complexity – whose evaluation resources are an overhead cost borne across the entire agency (vs. tied to a program grant).

KEY TAKEAWAYS

1. Have a systematic process for evaluation management.
2. Don't be afraid to stop at whatever tier is most appropriate for the program.
3. Remember – the higher the tier, the more resources needed!

WHY WE ENGAGE IN EVALUATION

REPORTING	OPERATIONS	LEARNING
Foundations; *Individual donors*; *Federal and state grants*	*Program managers*; *Agency leadership*; *Board of Directors*	*Evaluation professionals*; *Other nonprofits*; *Research institutions*

THE CENTRAL QUESTION

"What <u>data</u> should each program be collecting, given the <u>questions</u> that it needs to answer for its particular combination of <u>stakeholders</u> and the <u>resources</u> available?"

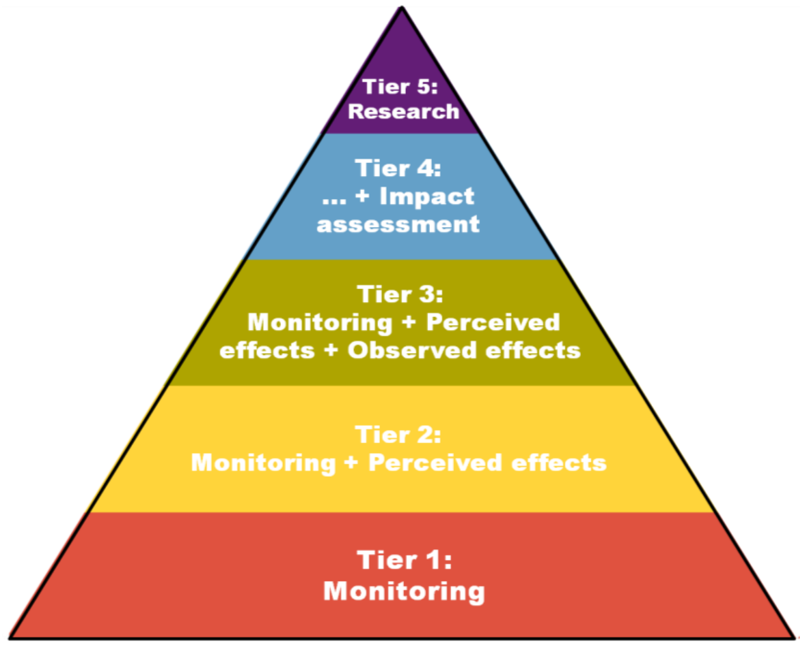
A TOOL FOR EVALUATION MANAGEMENT

Our tool works at two levels:

1. <u>Program-specific</u>: The tool helps to specify what data is needed to answer each program's key questions, the process for collecting that data, and the ***programmatic*** resources required to engage in that level of evaluative activity.
2. <u>Agency-wide</u>: The tool facilitates a "portfolio" view, clarifying the resources needed by the ***evaluation department*** to execute all program evaluations across the agency.

THE "TIERS" TOOL:

- A program should not go up a tier until it has in place a robust implementation of the previous tier.
- It is especially important to have a strong foundation of basic monitoring before attempting to measure any outcomes.
- The number of agency programs engaged in each tier shrinks as you go higher.



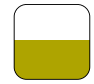
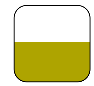
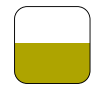
TIER 1: MONITORING

Questions	• How many people are you serving per month/year? • What is their demographic composition? • With what types and volume of activities are you serving them?	
Process	• Refresh intake sheets; train staff on data collection • Put in place data completeness reports • Share program monitoring reports	Complex Simple
Data	• Client enrollments • Program-specific descriptive, demographic, and diagnostic fields • Outputs (program activities) • Process outcomes (e.g., attendance)	A lot A little
Resources	• Program staff: Data entry and completeness monitoring • Evaluation staff: Intake sheet design; staff training; report-generation	Many Few

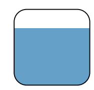
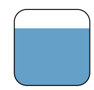
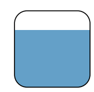
TIER 2: PERCIEVED EFFECTS

Questions	• What changes do participants perceive as a result of the program? • Do participants feel the goals of the program were achieved? • What suggestions do participants have for program improvement?	
Process	• Surveys of clients, family, staff, and volunteers • Focus groups/interviews	Complex Simple
Data	• Participant satisfaction • Perceived Effects (subjective) • Achievement of program goals (subjective)	A lot A little
Resources	• Program staff: Survey design and implementation • Evaluation staff: Survey analysis and reporting	Many Few

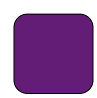
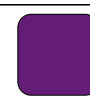
TIER 3: OBSERVED EFFECTS

Questions	• What percent of clients are achieving specific program goals? • What percent of clients are achieving specific individual goals?	
Process	• Goal achievement tracking • Third-party observations • Case notes review	 Complex Simple
Data	• Program-specific customized outcome tracking protocols (objective) • Observation checklists (objective) • Structured case notes (objective)	 A lot A little
Resources	• Program staff: Training & real-time data tracking • Evaluation staff: Training, tools design, monitoring	 Many Few

TIER 4: IMPACT ASSESSMENT

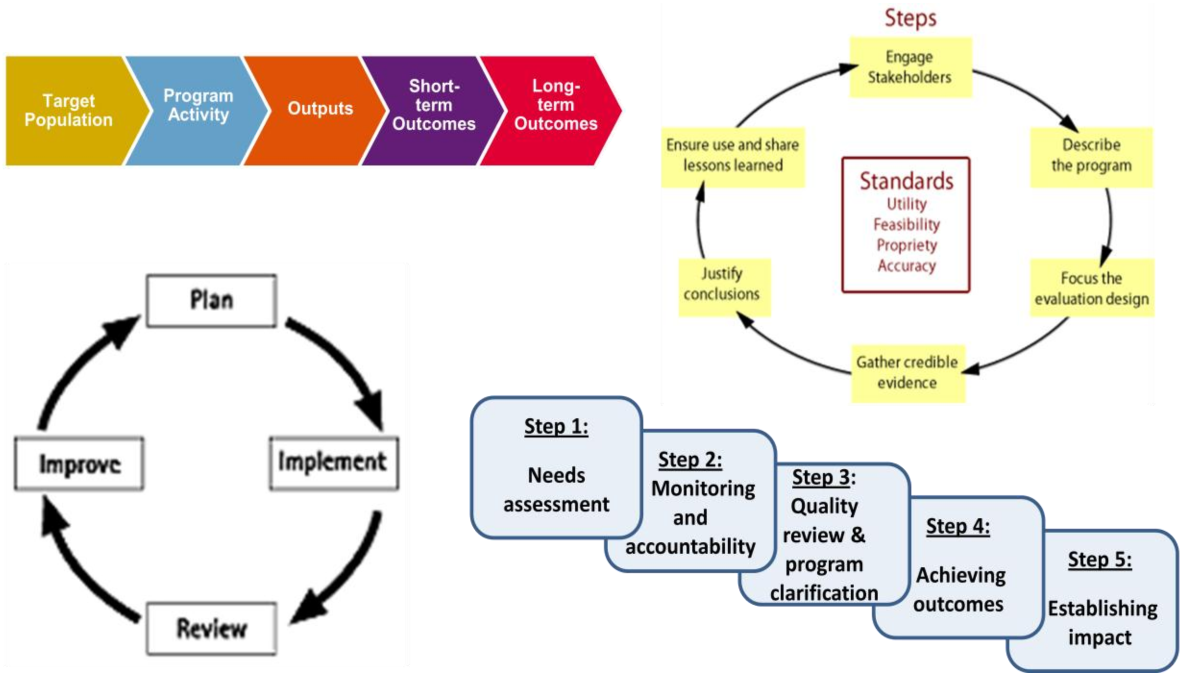
Questions	• What long-term changes, if any, have occurred among participants as a result of the program?	
Process	• Conduct comprehensive literature review • Conduct long-term program evaluation planning including logic model • Produce periodic in-depth data analyses	 Complex Simple
Data	• Quantitative and qualitative from standardized assessments and validated measures	 A lot A little
Resources	• Program staff: Significant time to administer tools • Evaluation staff: Significant time identifying and piloting tools	 Many Few

TIER 5: RESEARCH

Questions	• What does this implementation suggest about the efficacy of this kind of intervention for similar populations? • Should this program be positioned for replication?	
Process	• Collaborate with an academic partner, under the approval of an IRB • Put in place a rigorous study design • Collaborate on publication of results	 Complex Simple
Data	• Customized intake packets • Battery of standardized, validated tools	 A lot A little
Resources	• Program staff: Depends on availability of an RA or other data collection team • Evaluation staff: Depends on whether Primary Investigator is external	 Many Few

ACKNOWLEDGEMENTS AND DEVELOPMENT OF THE "TIERS"

Our approach was inspired by many standard evaluation frameworks, including (clockwise from top left), the logic model, the Centers for Disease Control evaluation circle, a standard QI cycle, and Fran Jacobs' stepwise approach to program evaluation.



Sources: CDC Program Performance and Evaluation Office; Jacobs, F. (2003). Child and family program evaluation: Learning to enjoy complexity. Applied Developmental Science, 7(2), 62-75.

However, it is critical to understand that unlike all of the above frameworks, TIERS is **a tool for evaluation management, not a roadmap for the evaluation process itself.**

Our model is probably most closely aligned with one proposed by Idealware in their recent paper "The Reality of Measuring Human Service Programs" (http://idealware.org/reports/reality-measuring-human-service-programs-results-survey). However, this model focuses on what to measure at each level without going into specifics about the processes and resources required in order to do so.

HOW TO REACH US

Please contact us for more information about using this tool:

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