

# **Matching Evaluation Strategies to Changing Evaluation Spaces and Environments**

Reflections on working as Technical  
Assistantship Team

American Evaluation Association, 2013

# By:

- Allison Shurilla, MS
- HACER
- Julie Nielsen, Ph.D.
- The Innovation Group, NorthPoint Health & Wellness Center, Inc
- Ann Zukoski, Dr.PH, MPH
- Rainbow Research Inc.
- Rodolfo Gutierrez, Ph.D.
- HACER

# Overview

## 1. Introduction

Rodolfo Gutierrez, HACER

## 2. Capacity Building

Alli Shurilla, HACER

## 3. Cultural Responsiveness

Julie Nielson, NorthPoint Health & Wellness Center, Inc.

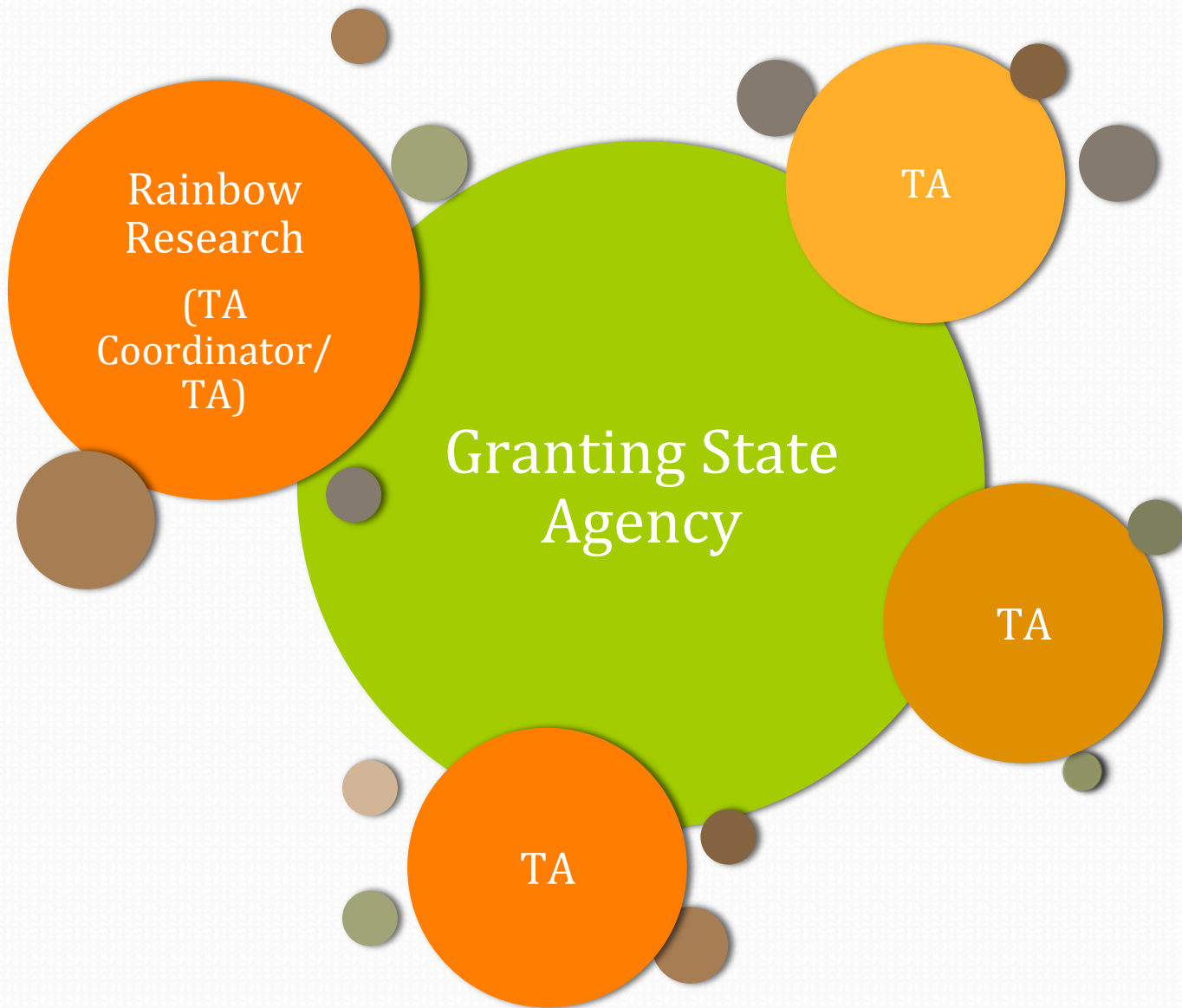
## 4. Multi-site Evaluation

Ann Zukoski, Rainbow Research

## 5. Developmental Evaluation

Rodolfo Gutierrez, HACER

## 6. Closing and Questions



Rainbow  
Research

(TA  
Coordinator/  
TA)

Granting State  
Agency

TA

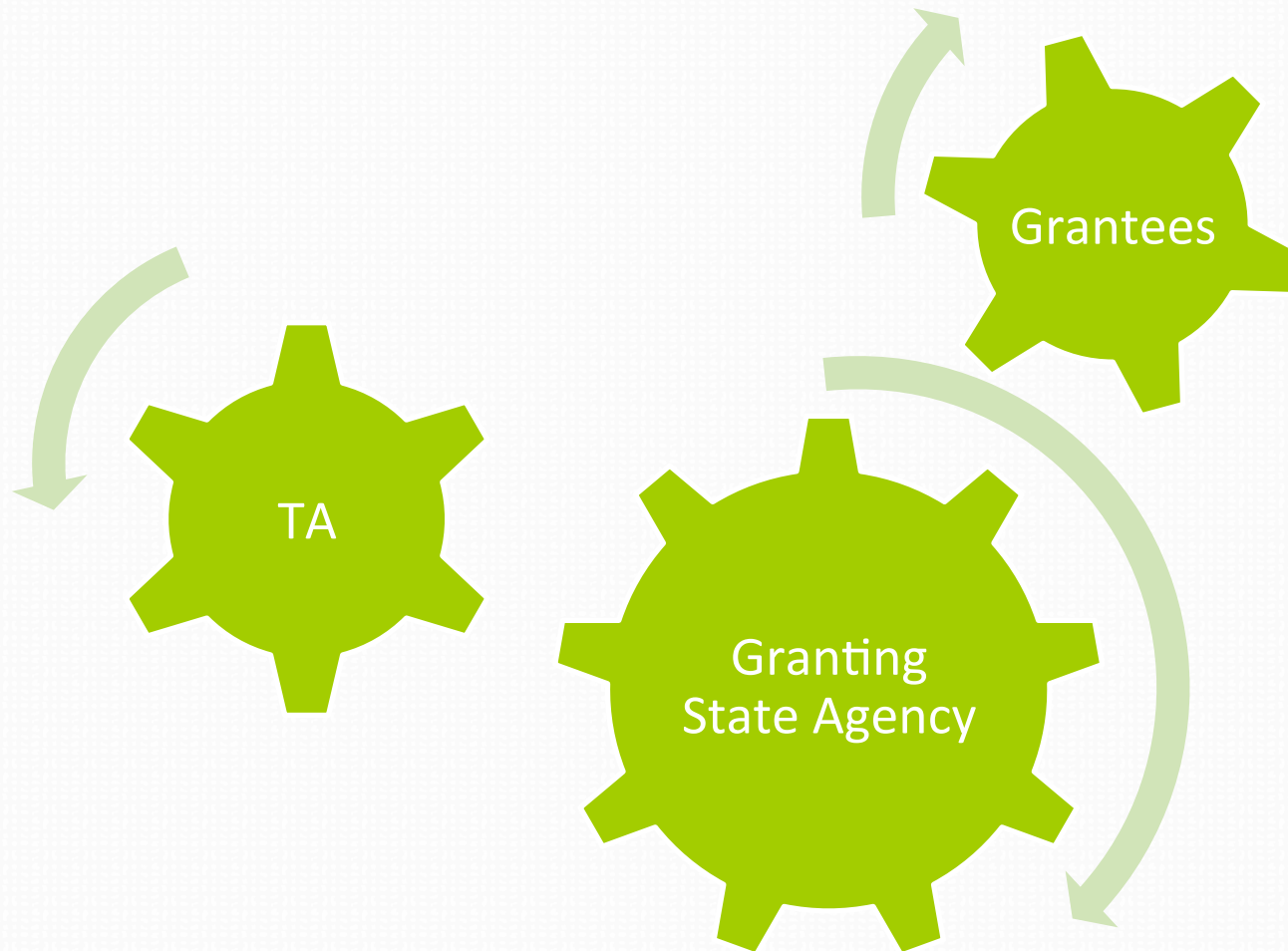
TA

TA

# Ideally



# In fact...



# Who are we

- EHDI, MDH, Rainbow Research
- The TA team has been managed by Rainbow Research, Inc. and is made up of evaluation experts from HACER, and Innovation Group at NorthPoint Health & Wellness Center.

# Evaluation Technical Assistance and Support Team





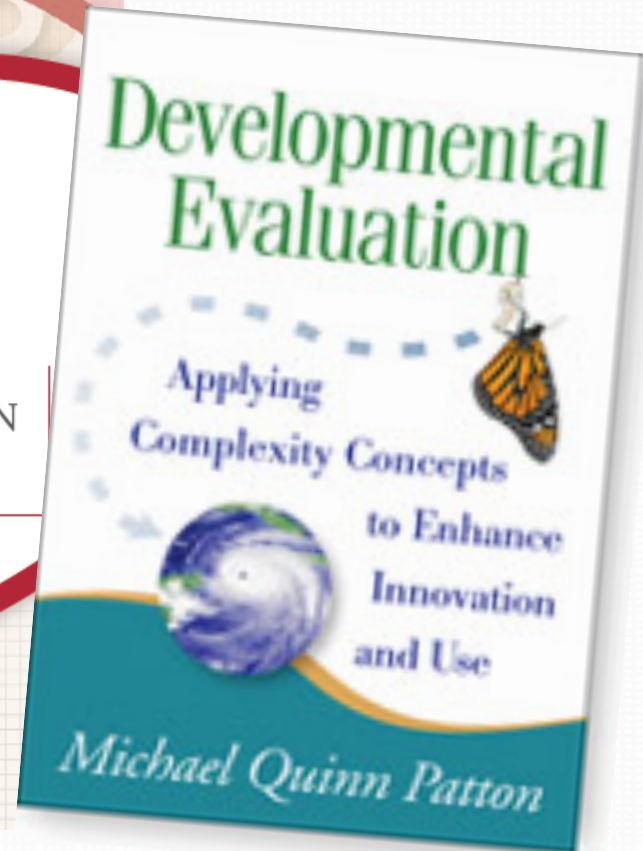
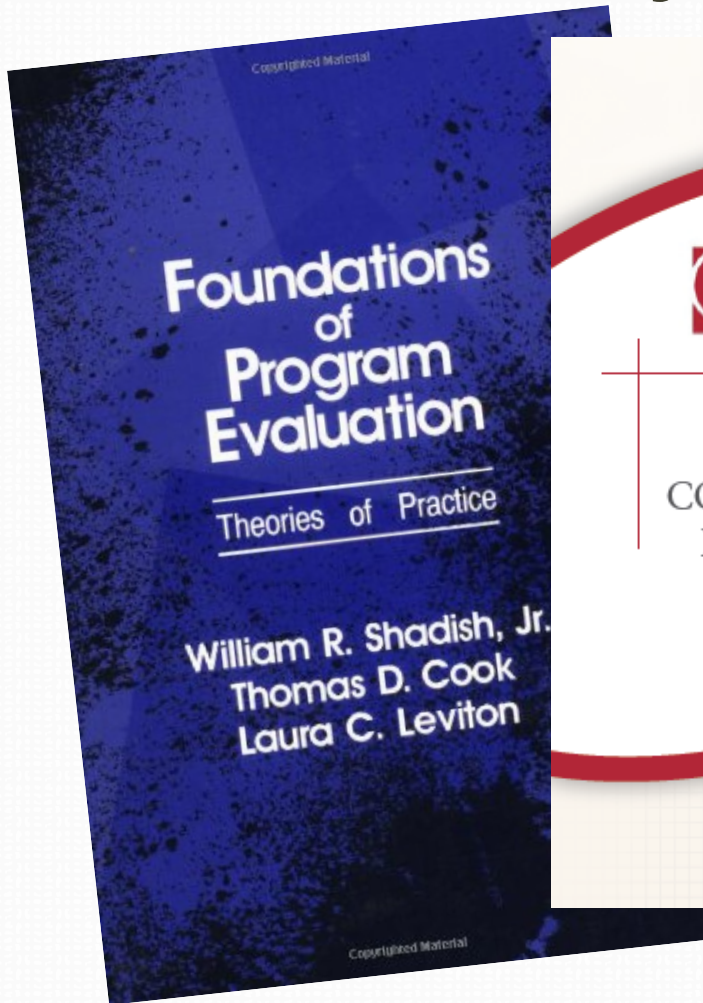
# Evaluation Technical Assistance and Support Team

- A team of experts is available to provide evaluation technical assistance (TA) and support to grantees with questions on evaluation planning or implementation
- The team is also working with Funder to coordinate resources and learning opportunities on topics that will support grantees' success

# The team offered these services:

- Individual meetings to develop evaluation plans and provide TA on their implementation
- Review and feedback on all evaluation-related materials
- Web access to evaluation resources and tip sheets
- Interactive working sessions with small groups of grantees on special topics of interest
- Webinars on topics related to the reduction of health disparities and social determinants of health

# Role of theory in our work



Alli Shurilla , HACER

# CAPACITY BUILDING

# Challenges

## Grant Design

1. Flexibility: evaluation and money use
  2. Required Documentation
  3. Short time frame
- Conflicts within framework categories
    - Valuing
    - Knowledge construction
    - Knowledge use

# Challenges

## Grantee Organizations

1. Existing evaluation capacity
2. Focus on funder requirements

What do they want me to say? What do I have to report on? What do I have to do?

- Valuing
- Knowledge construction, knowledge use

# Strategies

1. Individualized support
  2. Help grantees create evaluations that are feasible, meaningful, and useful
  3. Help grantees focus on evaluation rather than reporting
  4. Answer “evaluation practice” questions
    - “Given my limited skills, time, and resources, and given the seemingly unlimited possibilities, how can I narrow my options to do a feasible evaluation?”
- A useful, appropriate evaluation can allow organizations to more effectively communicate the value of their program to grantors.

# Lessons Learned

## New approaches for the future?

1. Communication between Tas
2. More comprehensive approach to technical assistance-based on theory rather than tools
3. Find a way to maintain flexibility while providing more guidance



# Contact Info.

## HACER (Hispanic Advocacy and Community Empowerment through Research)

[www.hacer-mn.org](http://www.hacer-mn.org)



- Rodolfo Gutierrez, Executive Director  
rodolfo@hacer-mn.org
- Alli Shurilla, Research Associate  
allison@hacer-mn.org

Julie Nielsen, Ph.D.

NorthPoint Health & Wellness Center, Inc.

# CULTURAL RESPONSIVENESS

# AEA Cultural Competence Statement

Five essential practices for evaluators:

- *Acknowledge the complexity of cultural identity.*
- *Recognize the dynamics of power..*
- *Recognize and eliminate bias in social relations.*
- *Employ culturally congruent epistemologies, theories, and methods.*
- *Continue self-assessments.*

# Animating CC Practices

“The methods and tools used for collection, analysis, interpretation, and dissemination of data are not culture free. . . [they] reflect the cultures in which they were developed.”

## On the one hand. . .

Indigenous organizations create programs that reflect the values of Native cultures and indicate that they would like evaluation methods to reflect the unique cultural characteristics of the programs.

## On the other hand. . .

Indigenous organizations, like many community-based organizations are conditioned to focus on counting and sorting - demonstrating that they reached high numbers of participants and this approach uses standard Western-oriented methods and doesn't address quality or meaning

We offered traditional evaluation tools, time, and collective exploration to extend learning

**On the one hand. . .**

**Organizations contracted for evaluation services with Native evaluators who had a wide range of expertise and experience**

**On the other hand. . .**

Not all Native evaluators are oriented to either culturally responsive evaluation nor indigenous approaches to evaluation

Used the opportunity to offer capacity building to local evaluators, thus expanding the reach of the TA grant.

## On the one hand. . .

[Funder] staff invited grantees to create and submit non-linear culturally representative logic models in addition to the required documents

## On the other hand. . .

Grantees were already required to complete considerable documentation, to submit those documents to the ECB team for approval and to make changes recommended by the ECB team to align the evaluation documents with the work plans. Limited resources prevented many of the organizations to devote time to this additional opportunity

Ensured that grantees had examples to draw from, and focused on conceptual use of the material – near the end, several of the grantees discussed how they would make time to pursue these cultural logic models.

# Lessons Learned

- Flexibility is priceless – can use standard evaluation tools but explore amendments to these
- Allow enough time to extend evaluation learning
- Avoid assumptions about evaluator skills and intent



# Contact Information

Julie Nielsen, Ph.D.

The Innovation Group

NorthPoint Health & Wellness Center, Inc.

- [www.northpointhealth.org](http://www.northpointhealth.org)

Ann Zukoski, DrPH  
Rainbow Research, Inc.

# MULTI-SITE EVALUATION

# Catching a cat by it's tail: Designing Evaluation TA that meets Funder and Agency Needs...



Is it possible?

# Creative Tensions : Challenges & Solutions



## **Our Context**

- Wide but Narrow Parameters
- Pressure to ensure grantees demonstrate outcomes
- Emergence of new funder needs
- Shortened time frames

# #1. Individual vs. Collective Approach

## On one hand

Charge to provide TA to assist 30+ grantees to conduct evaluation of their individual program

## And on the other....

Unspoken need for evaluation outcomes to be rolled up for state legislative report

- **Honored & supported individual grantee needs** provide TA & create tools to standardize— Logic Models, Evaluation Plans, Annual Report, Focus reporting
- **Created & maintained space for ongoing dialogue** about creative tension with state staff & grantees

## #2 Changing Funder Needs

### On one hand

Charge to do outcomes evaluation of evidence based and cultural practices

### And on the other....

With legislative pressure- asked to prove cost effectiveness

- **Training-** Created tip sheet with examples and resources for how to answer cost effectiveness questions
- **Reporting** - Structured annual report requirements to be realistic of grantee capabilities

# #3. Changing Time Frames

## On one hand

Original grants were for 3 years

## And on the other....

- Grant period cut to 1 yr
- Gov't shut down
- Last minute 9 mth ext.
- New RFP – 1 year
- Last minute 9 mth ext.

- Created 3 year TA plan... but changed it!
- Managed expectations –
- Shortened required tools
- Provided TA on reporting

# Lessons Learned

- Stay close to the funder & anticipate emerging needs and demands
- Communicate... Communicate.... Communicate...
- Embrace the intermediary role! Look at the big picture
- Don't forget the important roles of evaluation theory and practice
- Clearly map and document TA path for transparency
- Build cohesive TA and Grants Management Team that understands tensions and finds creative solutions



# Contact Information

Ann Zukoski, DrPH, MPH

Rainbow Research, Inc

[azukoski@rainbowresearch.org](mailto:azukoski@rainbowresearch.org)

[www.rainbowresearch.org](http://www.rainbowresearch.org)

**RAINBOWRESEARCH** *helping organizations effectively reach their goals*

621 West Lake Street, Suite 300 Minneapolis, Minnesota 55408 612.824.0724 [rainbowresearch.org](http://rainbowresearch.org)

Rodolfo Gutierrez, Ph.D.

Hispanic Advocacy and Community Empowerment  
through Research (HACER)

# DEVELOPMENTAL EVALUATION

# Changing Plans

## Grant Requirements

1. New requests, redesigning strategies
  2. New evaluation outputs
  3. New evaluation outcomes?
  4. What shall we do?
- Similar demands to what Patton describes in his text:
    - Need of a flexible evaluation plan
    - Adjustments along the road
    - No fixed structure to limit changing situations

# Developmental Evaluation

## A possibility

1. Grantor requirements limited freedom to adjust evaluation plans
2. Limited budget allocation did not allow including team work
3. Afraid of going against the initial commitments put people away from change
4. Continuous changes within teams required constant adaptation

# Developmental Evaluation

## A possibility

1. TA's suggestions adjusting along the road
  2. Creating teams with internal/external evaluators and Program coordinators
  3. TA helpful communication and interconnection tool
  4. "Feasible Evaluation" different in each case  
"Given my limited skills, time, and resources, and given the seemingly unlimited possibilities, how can I narrow my options to do a feasible evaluation?"
- Environments and policies change continuously, therefore evaluation plans cannot be rigid

# Contact Information

HACER (Hispanic Advocacy and Community  
Empowerment through Research)

[www.hacer-mn.org](http://www.hacer-mn.org)



- Rodolfo Gutierrez, Executive Director  
rodolfo@hacer-mn.org
- Alli Shurilla, Research Associate  
allison@hacer-mn.org