

# How Do We Select the Right Evaluation Approach for the Job?

The most difficult part of evaluation can be to know where to begin. There is so much information we could gather, but the key is determining what is most useful for what we need to know now to make better decisions and improve performance. This piece offers a matrix to guide thinking about what we want to learn from our evaluation, what tools and methods can support that learning and what key questions can help shape evaluation plans.

To get started, grantmakers need to consider what stage we are at in the learning process, the approaches that best fit our and our grantees' capacity, the level of investment we want to make and what we want to learn. The matrix is organized by stage, or purpose, of evaluation:

1. Inform Strategy — What do we want to accomplish?
2. Track Outcomes — Are we doing what we said we would do?
3. Identify Improvements — How are we doing and what can we do better?
4. Understand Impact — What impact are we having?

The matrix offers types of information that may help inform each stage as well as evaluation approaches to collect that information. Some approaches may be more time and resource-intensive than others, so thinking about our and our grantees' capacity is critical. Also, some information-gathering techniques will benefit multiple stages of learning. For example, interviews, focus groups and surveys can be relatively easy ways to get input on a number of different questions.

The matrix includes links to definitions of some evaluation tools. Additional definitions are in the glossary that is part of the Smarter Grantmaking Playbook.

For more information on this topic, see [Four Essentials for Evaluation](#). (Washington, D.C.: Grantmakers for Effective Organizations, 2012).

<i>Stage</i>	<i>What You Might Need to Know</i>	<i>Approach for the Job</i>
<ul style="list-style-type: none"> <li>• <b>Inform Strategy —</b> What do we want to accomplish?</li> </ul>	<ul style="list-style-type: none"> <li>• The problem or need or both</li> <li>• The state of current practice in the field</li> <li>• How to set specific program goals and targets</li> <li>• Link to broader changes sought</li> <li>• Key stakeholders to involve</li> <li>• Potential risks or pitfalls</li> <li>• Existing data and research on the issue</li> </ul>	<ul style="list-style-type: none"> <li>• Needs assessment</li> <li>• Literature review</li> <li>• Commissioned research</li> <li>• Baseline measurement</li> <li>• <a href="#">Theory of change</a></li> <li>• <a href="#">Logic model</a></li> <li>• Environmental scan</li> <li>• Issue-level research</li> <li>• Developmental evaluation</li> </ul>
<ul style="list-style-type: none"> <li>• <b>Track Outcomes —</b> Are we doing what we said we would do?</li> </ul>	<ul style="list-style-type: none"> <li>• Number and type of goods and services delivered</li> <li>• People reached, demographics</li> <li>• Timing of goods and services</li> <li>• Progress against goals and targets</li> <li>• Unexpected deviations from plan</li> <li>• Changes in awareness, attitudes, knowledge and conditions</li> </ul>	<ul style="list-style-type: none"> <li>• Output measures (as defined in logic model or theory of change)</li> <li>• Outcome measures (as defined in logic model or theory of change)</li> <li>• <a href="#">Dashboard</a></li> <li>• Interim grant report</li> <li>• <a href="#">Before and after action review</a></li> <li>• <a href="#">Appreciative inquiry</a></li> </ul>

Stage	What You Might Need to Know	Approach for the Job
<ul style="list-style-type: none"> <li>• <b>Identify Improvements</b> — How are we doing and what can we do better?</li> </ul>	<ul style="list-style-type: none"> <li>• Quality of services and satisfaction of participants</li> <li>• Lessons learned</li> <li>• Changes needed to improve delivery</li> </ul>	<ul style="list-style-type: none"> <li>• Interim and final grant reports</li> <li>• <a href="#">Before and after action review</a></li> <li>• <a href="#">Appreciative inquiry</a></li> <li>• Output and outcome measures</li> </ul>
<ul style="list-style-type: none"> <li>• <b>Understand Impact</b> — What impact are we having?</li> </ul>	<ul style="list-style-type: none"> <li>• The extent to which goals are reached, needs are met, progress is made and problem is solved</li> <li>• Contributions to changes in community or movement of social indicators or both</li> </ul>	<ul style="list-style-type: none"> <li>• Portfolio-level assessment</li> <li>• Controlled trial (randomized, etc.)</li> <li>• Longitudinal study</li> <li>• <a href="#">Cluster evaluation</a></li> <li>• <a href="#">Shared measurement framework</a></li> <li>• Progress on foundation wide indicators</li> </ul>

## Questions to Consider

Grantmakers can consider these key questions for help in determining the best evaluation approach:

- **WHY:** What is the purpose of this evaluation? Who is our intended audience? What are its intended uses?
- **WHAT:** What do we want to learn? How much information will we need to collect in order to fulfill the purpose of our evaluation? How will we apply this learning?
- **WHO:** How will we involve the appropriate stakeholders in the evaluation? Who will we share the results with and how?

- **HOW:** Who will collect and analyze the necessary data? What is our and our grantees' capacity? How can we leverage existing resources, infrastructures and capacity to assist in evaluation?

## Conclusion

Focusing on the appropriate stage can make evaluation planning feel much less daunting. In addition to the stage the work is in, evaluation plans should consider capacity — both for grantmaker and grantee — and who else may already be gathering some of the needed information. Also, grantmakers must carefully consider whether and how we will use information gathered. If at any point we're not sure how we or our grantee might use the information, then we probably don't need it. Finally, evaluation plans should evolve as the work evolves, so we need to revisit and update plans periodically.