

Evaluation can help you understand the outcomes and impacts of your education and training activities. It can also show you whether your activities are achieving their objectives. Through evaluation, you can understand what is going well, what is not going well, and how to improve. You can also use the evidence collected during evaluations to communicate your results to others and show accountability to stakeholders.

This trainer essential introduces the term “evaluation” and summarizes a six-step process for evaluating education and training activities. Recognizing that each evaluation occurs within a different range of circumstances, you can modify the information provided to fit with your project.

COMPARING EVALUATION, MONITORING, AND ASSESSMENT

The terms “monitoring” and “evaluation” are often used interchangeably. Occasionally, “assessment” is also mixed in with these terms. Although many of the considerations are similar between these activities, their uses and purposes are different.

Monitoring is an ongoing process done throughout a project. It is a way of checking in and following up on the day-to-day and week-by-week activities that move the project toward its objectives. Monitoring is a warning system to catch small problems as they arise and make small adjustments before they become large problems that require large adjustments. It is designed to answer the question: “Are we doing things **right?**”

Evaluation is a snapshot at one time in the life of a project. It asks bigger questions once the project is over (or well on its way). Evaluation can happen at the end of the project or at key points during the project’s development. It is designed to answer the question: “Are we doing the **right things?**”

(CAWST, 2011, p. 10)

Evaluations collect information to allow you to determine if the project has achieved, or is making progress toward, its desired outcomes and impact. The information can be used to answer the following questions:

- How close is the project to meeting its goals?
- What lessons can you learn?
- Is there a better way to do things?
- What do you need to change in the project design and implementation?

You need both ongoing monitoring and specific evaluations to effectively measure project results. By doing both, you are able to understand the quality of the day-to-day activities, as well as the overall progress toward project goals.

Assessment is a term often used in relation to training. It involves gathering information to determine if participants are achieving the learning outcomes of the training. The goal of assessment is ultimately to improve participants' learning (Ontario Ministry of Education, 2010). There are two types of assessment: formative and summative. Similar to monitoring, formative assessment involves checking participants' learning as it is happening and then adapting your teaching for improved results. Similar to evaluation, summative assessment usually takes place at the end of a training or major milestone in a course and is used to measure a learners' overall achievement.

PURPOSE OF EVALUATION

There are many different purposes for completing an evaluation. Most reasons for initiating an evaluation fall into two categories:

1. For internal learning and improvement. (For example, to learn what methods worked and what did not, to understand what changes or further work you need to meet the project goals, to make decisions about the project's next steps, or to find out what to do better for the next project).
2. For external communications with stakeholders. (For example, to report progress or results to the project funders, to communicate the results to beneficiaries and other stakeholders, or to attract new donors).

(Equitas: International Centre for Human Rights Education & United Nations, 2011)

Also, many evaluations are done for a combination of these reasons. It is important to clarify the specific purpose before starting to plan an evaluation. The purpose will affect how you design the evaluation (Simister & Smith, 2010).

WHEN SHOULD THE EVALUATION HAPPEN?

The timing of an evaluation influences what information you collect and how you use the results (Organisation for Economic Co-operation and Development, 2009). Ideally, you plan evaluations when designing an education or training program to ensure that the evaluation activities match the goal of the training. It also enables you to develop a baseline. To get a good understanding of the short- and longer-term outcomes of a training, it is useful to collect information before, immediately after, and several months (or longer) after the training event. However, this number of evaluations is not always possible due to project resources constraints or other factors.

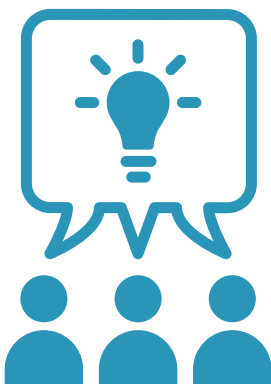
The following steps are a guide for conducting evaluations for education and training programs. You can conduct the steps at different times within the training project life cycle, depending on when you plan the evaluation:

1. Review the Project and Decide on the Evaluation Goal



Before designing the evaluation, you will need a detailed understanding of the project you are evaluating. You will need to review the objectives, timeline, background, and stakeholders. You will also need to identify any current strengths and weaknesses of the project. After reviewing the project, you must agree on the purpose of the evaluation and develop a goal statement for the evaluation. The goal statement is essential for guiding the evaluation plan. It ensures that you design an evaluation that will achieve the desired purpose.

2. Decide What Information You Need



For an evaluation to be useful, the information gathered must relate to the purpose of the evaluation. Developing a theory of change for the project is a useful way to determine what information you need. A theory of change is a description of how an organization believes their project activities make progress toward reaching their objectives. The Kirkpatrick Model can be used to create a simplified theory of change for training (Kirkpatrick, 1959). It defines the theory of change in terms of four levels: reaction, learning, behaviour, and results.

A theory of change will enable you to develop indicators that measure the key outputs, outcomes, and impacts of your education project. It is important to develop a set of clearly defined SMART (specific, measurable, achievable, relevant, time-bound) indicators to guide the evaluation activities.

3. Plan for Gathering the Information



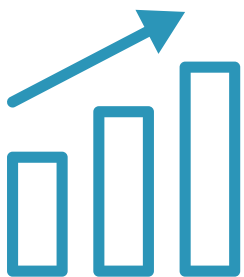
After defining what information you will need for the evaluation, you must develop a plan for how to gather that information. Evaluations usually use a combination of information collected during the project lifespan and new information that you need to collect during the evaluation. The first step is to identify the relevant information that was already collected so that you do not waste time collecting it again. When you have identified what new information you need, you can plan how to collect it. For an education project, information sources may include the training participants and those they went on to train or influence. There is also a range of methods available to collect the information, including interviews, site visits, observations, surveys, and focus groups. Each method has different strengths and weaknesses. There is a range of factors that influence the best choice of methods for different situations.

4. Gather the Information



Next, you can use the data collection tools to gather the information. It is important to plan the logistics for how the information will be collected. You also need to develop a strategy to ensure that your data collection team can collect and record the data in an efficient and accurate way. Throughout the data collection phase, it is important to review and adjust the data collection plan so that you can make improvements immediately and get the best information possible.

5. Identify Gaps and Trends in the Information



After you have collected the data, you will need to reflect on what it means and what you can learn from it. This is a critical step in the evaluation, and the time required for reflection is often underestimated. A thorough process to analyze and interpret information will reveal useful and relevant findings.

By managing the data using a spreadsheet or another software tool, you can arrange the information in a clear and simple way. Identifying the gaps and trends in the information will be easier. Graphs, tables, and other visual representations of the data will enable you to better interpret the information.

6. Use the Findings



The next step is to develop recommendations for the project based on the findings. For each evaluation indicator, you should discuss and agree upon improvements you can make. You can then develop an action plan. The plan should include responsibilities and timeframes for implementing the improvements. Next, you can communicate the findings of the evaluation with others, through written or verbal reports. The appropriate style for reporting will depend on the specific audience and purpose of the evaluation.

Evaluation provides a snapshot of the life of a project that will help you to understand whether a training is meeting your goals. By following the six steps for conducting an evaluation, you can learn valuable lessons about how to improve your training.

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