Getting to What Matters
How to Evaluate and Communicate Your Impact

2015 Leadership Summit

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Dialogues In Action
Evaluation is leadership
Watch effect, not just effort
The story we tell ourselves is often just that
Simple and elegant is best
All evaluation educative
Beware of vanity metrics
Participation is powerful
Making people critics of themselves is usually better
Metrics are people too
Avoid the naturalistic fallacy
There is no short-cut to insight
Evaluation is a human endeavor
Key Idea #1

Why do we evaluate?

To Prove          To Improve
Key Idea #2

Two Modes of Evaluation
Modes of Evaluation

**Quantitative**
- **data**
- **numbers**
- **instrument**
- **tool**
- **method**
- **standardized**
- **purpose**
- **measure**
- **application**
- **compare/contrast**

**Qualitative**
- **conversations**
- **observations**
- **artifacts**
- **self**
- **organic**
- **see qualities**
- **appraise/discern**

**Anecdote**
- **stories**
- **hearsay**
- “treasure hunt”
- illustrate
- inspire/warn

**Credible**

**Not Credible**
Key Idea #3

Heart Triangle
Know  Believe  Love  Feel

Become

Do
Example Questions from a *Ways to Work* qualitative protocol at Metropolitan Family Services

How has your ability to pay bills on time changed as a result of this program? \(\rightarrow\) **How have you changed your lifestyle to make this possible?** (Do-Become)

What beliefs did you hold that limited your financial stability before this program? \(\rightarrow\) **How do you see your future differently since this belief shifted?** (Know-Believe)

Before being a part of this program, what were your biggest fears when you thought about your finances? \(\rightarrow\) **How have you developed in your ability to stick with your commitments in the face of your anxiety?** (Feel-Love)
What makes you most excited about having and managing volunteers? What’s most frustrating or disheartening to you? → What keeps you committed to using volunteers even when it’s frustrating? How has your dedication to using volunteers grown through your interaction with ICVS? (feel-love)

What have you learned from ICVS that has been most eye-opening for you in your path to understanding volunteer management? → How do you look at your work differently now – your organization, its clients/customers, volunteers, and the community at large? (know-believe)

What challenges have you faced with implementing volunteer management practices you have learned from us (either within your organization as a whole, or with your volunteers/clients/customers)? → What strengths have been developed in you and your organization to meet these challenges? (do-become)
What are the key principles/ideas that drive our work here? →
What personal values of yours have found expression in this work?

What have you learned during your time with us? →
How do you see the world/people/your own life differently because of your time working here?

As a staff member, what do you find perplexing or confusing about our work? →
How have your beliefs and values been challenged through this work?

In your mind, what is our strength of our strategy for service delivery? →
How do these expectations resonate with you personally as a leader?

What have you learned most from our staff development opportunities (whatever you call these in your program)? →
How has this influence the way you approach your work?
What makes you feel most successful in your work? 
How has this shaped or influenced what you want your life to be about?

What is most exciting about your work here? 
What about this work do you love?

What is most annoying or frustrating to you about your job? 
What keeps you committed to this even when it’s hard to do?

What is your most frequently experienced emotion you feel in this work? 
How has that affected your heart for the work over time?

When did you feel most excited last week? When did you feel most vulnerable? 
What continues to inspire you? What keeps you coming back to work? 
What makes your feel most frustrated in your work? 
How have you stayed focused and engaged through these frustrations and challenges?
Do ➔ Become

What skills have you developed since being here? ➔
How have these been applied in other areas of your life and work?

What tasks have you struggled with the most (or found most challenging) in your role here? ➔
What needs to grow and develop in you to be able to thrive in this work/organization?

What new approaches have been trying out recently in your role here? ➔
What changes in you have others noticed and commented on, inside or outside of work?

How have you been stretched professionally during your time here? ➔
What strengths or resources within yourself have you drawn on to serve well here? In what ways do you desire to grow?

What do you consider to be your greatest achievement/accomplishment this past year? ➔
What changes do you see in yourself as a result of working here?
Calgary Middle Years (10-15yrs old)
YMCA, Big Brothers/Big Sisters, Bridge Foundation for Youth

What have you learned about making good and healthy friendships? → How do you see people differently now that you’ve been through this program? (Know → Believe)

In what ways have you felt supported in this program? → How are connected to people who care about you? (Feel → Love)

What did someone help you with this year? What have you done to help someone else during this program? → How have you become a more of a role model? (Do → Become)
What have you learned about solving problems and facing challenges through this program? → What’s the most important part of this to you and to your life? (Know → Believe)

What excites you most about this next year? → How has your time in this program made a difference in what kinds of things you’ll commit your life to? (Feel → Love)

What has this program made you look forward to in the future? → What kind of person do you want to be as you grow up? (Do → Become)
Key Idea #4

Evaluation Windows
Logic Model

"if"

Activity → Output → Outcome → Impact

"then"

**Effort**
What we do...
How we are doing...

**Effect**
What we achieve...
What has changed in them...
## Evaluation Windows

<table>
<thead>
<tr>
<th></th>
<th>Activity (Effort)</th>
<th>Impact (Effect)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Outside the triangle</strong></td>
<td>E1</td>
<td>E3</td>
</tr>
<tr>
<td>Quantitative</td>
<td>Know, Feel, Do</td>
<td></td>
</tr>
<tr>
<td><strong>Inside the triangle</strong></td>
<td>E2</td>
<td>E4</td>
</tr>
<tr>
<td>Qualitative</td>
<td>believe, love, become</td>
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## Example: Mentoring Program

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<tbody>
<tr>
<td><strong>E1</strong></td>
<td>Adult/Child ratio</td>
<td></td>
</tr>
<tr>
<td></td>
<td># of times per week the adult and child connect</td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>E3</strong></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Children <em>know</em> more about how to relate to adults</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Children <em>feel</em> more excited to seek mentoring from adults</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Children <em>talk</em> more to adults more frequently</td>
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<tr>
<td><strong>E2</strong></td>
<td>Quality, mature, caring adult</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Meaningful, engaging relationship</td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>E4</strong></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Dream of “my story”</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Agency &amp; Empowerment</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Resiliency</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Hope</td>
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**Quantitative**
- Know, Feel, Do

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**Qualitative**
- believe, love, become
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Getting to What Matters
*How to Design and Develop Evaluation*

Moving Icebergs
*Leading People to Lasting Change*

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