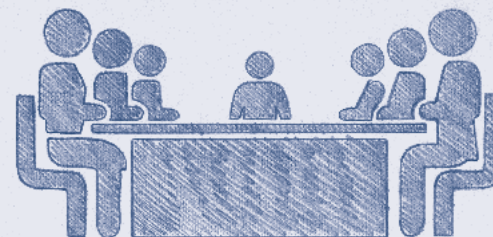


# Getting your organisation ready to do evaluations

MAY 2017

## Using Evidence for Impact



### PART 3

Planning guide  
and templates

## What is this document about?

### Quick overview

This document is about *planning* your organisation's evaluation capacity building.

This is done in two consecutive activities:

- 1 Collective agreement on the questionnaire's ratings which are then transferred into the worksheet summary
- 2 Identifying the priority areas to develop.

As previously mentioned, there are no right or wrong ratings or priority areas. The value comes from you and other participants discussing how you understand the current situation and therefore build evaluation capacity.

Once you have completed these two activities (i.e. the planning) you will be able to answer the following questions:

- What are your organisation's strengths and areas of improvements?
- How do you build your evaluation capacity?



## How do you complete the 'Organisation worksheet summary'?

Everyone who has filled out the questionnaire (at the assessment stage (Part 2)) is invited to discuss their thoughts and comments on why and how they gave the ratings they did. Discrepancies in ratings are likely to arise – this is to be expected, as everyone experiences different situations in an organisation. Through discussion a common ground can be found. If you find large differences, try to find out what has led to them. Once the one set of ratings has been agreed on, record in the 'Organisation worksheet summary'. Next the actual planning stage can take place.



## How do you develop your 'Organisation planning worksheet'?

### Constructive discussion is critical

The overall group is divided into three smaller groups, if possible, so that each group can discuss one area in depth (i.e. either *Context*, *Organisation* or *People/Individuals*<sup>1</sup>). This next round of discussion centres on the stronger and weaker aspects of each area. It is important to identify the key areas of concern that need to be prioritised and addressed in order to build your organisation's evaluation capacity. Note that your priorities may not reflect the lowest ratings. Your priorities may instead reflect your organisation's strategic needs and what you identified in your baseline.

1. This is to minimise the time involved, but it is fine to do it all together if that suits your organisation.

## Prompts to guide the discussion

### Looking at the ratings for Context, Organisation and People/Individuals:

- What do the ratings tell us we are doing well on?
- What do the ratings tell us we could do better on?
- Does this make intuitive sense?
- Any surprises, puzzles?

### Looking at the *low* ratings for Context, Organisation and People/Individuals:

- How do we make sense of this?
- What do we think is going on here?
- What opportunities might this present?
- What do we need to do to improve our capacity in this area?

### Priorities for our evaluation capacity building:

- What are the ratings telling us about the gaps/priorities for evaluation capacity building in each dimension?
- What could we do to improve our capacity in each area?
  1. Keep (what strengths/capacities can we build on?)
  2. Amend (what do we need to change?)
  3. Add (what do we need to introduce?)
  4. Delete (what is holding us back? What do we need to stop?)

### Timeframe for building our evaluation capacity:

- What can we achieve in six months? 12 months? 18 months? 24 months?

It may not always be possible to reach a consensus within each group on the organisation's strengths and areas of improvements – this is fine. Key areas of concern can be discussed with the overall group – feedback will help to clarify which concerns should be prioritised.

Once the discussions on areas of concern and prioritisation are finished, each group then reports on up to three priorities in the 'Organisation planning worksheet' (either for Section 1 *Context*, Section 2 *Organisation*, or Section 3 *People/Individuals*), and potentially some ideas on how to address them.

## Prompts to help with planning

### Identifying three key focus areas:

- What are our three key positive priorities which can be achieved in the next 12 months?

### Developing and implementing plans:

- What strategies will most help us achieve our results?

### Working out what we need to achieve our plans:

- What kinds of resources and support do we think we will need to achieve our results?

### Checking how well we are doing:

- How will we know we have been successful?
- What will our success measures be?
- What will we see, hear and feel?

At this stage, the overall group needs to agree on a common strategy to proceed, as this will become a key reference document, or asset, for the organisation's leaders and staff to build evaluation capacity.

## Organisation worksheet summary: creating a common platform for Evaluation Capacity Building (ECB)

Section 1 → Context	Section 2 → Organisation	Section 3 → People/Individuals
<p><b>1. Values and principles</b></p> <p>1.1 _____ 1.4 _____</p> <p>1.2 _____ 1.5 _____</p> <p>1.3 _____</p>	<p><b>5. Commitment of leaders to developing evaluation capacity in the organisation</b></p> <p>5.1 _____ 5.3 _____</p> <p>5.2 _____ 5.4 _____</p>	<p><b>9. Readiness</b></p> <p>9.1 _____ 9.3 _____</p> <p>9.2 _____ 9.4 _____</p>
<p><b>2. Purpose and history</b></p> <p>2.1 _____ 2.4 _____</p> <p>2.2 _____ 2.5 _____</p> <p>2.3 _____ 2.6 _____</p>	<p><b>6. Learning culture</b></p> <p>6.1 _____ 6.3 _____</p> <p>6.2 _____ 6.4 _____</p>	<p><b>10. Skills and knowledge</b></p> <p>10.1 _____ 10.3 _____</p> <p>10.2 _____ 10.4 _____</p>
<p><b>3. Enabling environment</b></p> <p>3.1 _____ 3.4 _____</p> <p>3.2 _____ 3.5 _____</p> <p>3.3 _____</p>	<p><b>7. Communication and information sharing</b></p> <p>7.1 _____ 7.4 _____</p> <p>7.2 _____ 7.5 _____</p> <p>7.3 _____</p>	<p><b>11. Level of involvement</b></p> <p>11.1 _____ 11.4 _____</p> <p>11.2 _____ 11.5 _____</p> <p>11.3 _____</p>
<p><b>4. Evaluation Capacity Building (ECB) purpose</b></p> <p>4.1 _____ 4.3 _____</p> <p>4.2 _____ 4.4 _____</p>	<p><b>8. Resources and infrastructure</b></p> <p>8.1 _____ 8.4 _____</p> <p>8.2 _____ 8.5 _____</p> <p>8.3 _____</p>	<p><b>12. Opportunity</b></p> <p>12.1 _____ 12.3 _____</p> <p>12.2 _____ 12.4 _____</p>

## Organisation planning worksheet → SECTION 1: CONTEXT

Identifying our three key focus areas	Developing and implementing our plans	Working out what we need	Checking how well we are doing
<p><b>Example.</b> Better communication of the organisation's strategic direction to all staff</p>	<ol style="list-style-type: none"> <li>1. Write the strategic direction down</li> <li>2. Explain it to all staff (e.g. morning meeting)</li> <li>3. Put it up on the staff notice board</li> </ol>	<ol style="list-style-type: none"> <li>1. Computer, printer and laminator to produce the strategic direction document</li> <li>2. Meeting room to communicate to staff</li> </ol>	<ol style="list-style-type: none"> <li>1. All staff understand what the organisation aims for, within what timeframe and why</li> <li>2. Our processes better reflect what we are about and where we are going</li> </ol>
1.			
2.			
3.			

## Organisation planning worksheet → SECTION 2: ORGANISATION

Identifying our three key focus areas	Developing and implementing our plans	Working out what we need	Checking how well we are doing
<i>Example. Being able to innovate (e.g. better service provision)</i>	<ol style="list-style-type: none"> <li>1. Awareness of what others do and subsequent discussion with staff (e.g. can we do the same?)</li> <li>2. Getting support from managers when implementing new ideas</li> </ol>	<ol style="list-style-type: none"> <li>1. Fortnightly time to discuss ideas with all staff</li> <li>2. Attending conferences to access information and increase our networks</li> </ol>	<ol style="list-style-type: none"> <li>1. Getting regular feedback from our clients about how we will provide services to them</li> </ol>
4.			
5.			
6.			

## Organisation planning worksheet → SECTION 3: PEOPLE/INDIVIDUALS

Identifying our three key focus areas	Developing and implementing our plans	Working out what we need	Checking how well we are doing
<p><b>Example.</b> More targeted training for all staff and volunteers</p>	<ol style="list-style-type: none"> <li>1. Develop mentoring within our organisation</li> <li>2. Access external training when required</li> </ol>	<ol style="list-style-type: none"> <li>1. All staff to share their knowledge, skills and experience</li> <li>2. Budget allocation (per person) for external training (if required)</li> <li>3. External speakers to come and discuss particular issues/solutions</li> </ol>	<ol style="list-style-type: none"> <li>1. Improvement in service delivery (e.g. happier and better supported clients)</li> <li>2. Internal survey (e.g. ability to deliver high quality services to clients)</li> </ol>
7.			
8.			
9.			





### Related Superu resources:

*Getting your organisation ready to do evaluations* is part of a suite of resources designed to upskill New Zealand's social sector by providing tools to effectively generate, evaluate and use evidence. For more information and to view or download resources, please visit Superu's website [superu.govt.nz/evaluation\\_evidence](https://superu.govt.nz/evaluation_evidence)



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The Families Commission operates under the name Social Policy Evaluation and Research Unit (Superu)

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