MICHIGAN OPERA THEATRE

Evaluation Toolkit

July 2018

Submitted By:

JFM CONSULTING GROUP

INTRODUCTION

The Michigan Opera Theatre (MOT) entered into a partnership with JFM Consulting Group (JFM), a local planning and evaluation consulting firm, to assist MOT in developing the organizations capacity to monitor and evaluate its programs. Over a period of several months, JFM worked closely with key MOT staff to review the organization's current capacity to evaluate its opera and dance programs. It was determined that one area in which MOT could benefit from additional support was data collection. In particular, MOT was in need of data collection tools and instruments that can be used across a range of programming moving forward.

One important aspect of the capacity building partnership between MOT and JFM involved the development of a longer-term, three-year framework for monitoring progress toward strategic organizational goals. This framework, as illustrated in the Action and Change Rubrics presented in this toolkit, provides a process and structure for measuring the results or outcomes that MOT expects to achieve now and in the years ahead.

The toolkit is divided into two main sections. Section One provides an overview of evaluation, including a description of the types of evaluation, the evaluation process, data collection methods, and a comparison of the benefits and challenges of internal vs. external evaluation. Section Two provides a number of evaluation tools to support MOT's evaluation activities, including the Action and Change Rubrics to guide the organization's evaluation efforts. Several survey instruments are provided as well to assist MOT in collecting data from visitors, partners, staff, volunteers and students. This toolkit was developed drawing from a wide range of resources, listed in the Appendix, which also includes a glossary of key evaluation terms and an evaluation readiness checklist. It is anticipated that MOT will use this toolkit on an ongoing basis in the years ahead as a resource for monitoring and evaluating the effectiveness of its strategies, programs and activities.

SECTION ONE

Evaluation Overview

Why Evaluate?

Trust, Transparency and Accountability to Your Stakeholders

Building structured feedback mechanisms into performances, classes, camps and workshops sends participants the message that you are interested in what they have to say and offers a transparent process for them to share feedback on the program. Having an evaluation form available at the end of a workshop, building in time for participants to complete evaluation

forms, and offering contact information for follow-up questions signals to participants that their experience and perceptions matter.

Evaluations offer a process for listening and learning. Also, the use of data to measure progress and results brings increased accountability to programming. Evaluations helps organizations stay accountable to stated objectives or stakeholders, and provides the basis for making changes in program offerings. The use of evaluation data for these purposes increases the flow of information and transparency, thereby building trust with others in your organization, funders, partners and most importantly, program participants.

Evidence-Based Improvements to Programs and Services

Lessons learned from evaluating services or initiatives can lead to practical improvements that are based in evidence sourced directly from the targeted group. Evaluations help assess whether stated goals are being met, identified targets are reached or that an appropriate service model is being used for the targeted population. In this way, the evidence which is gathered to improve services is relevant, usable and tailored to the context. Evaluations can also illuminate unexpected outcomes and at times, challenge some of the basic assumptions about a certain target population that may be made during program planning. All of this can improve programming, and help others to improve their work as well. Capacity automatically begins to build by engaging in evaluation and sharing what is learned with others.

Demonstrated Effectiveness to Funders and Others

The data collected and analyzed through evaluation serves to drive the future sustainability or growth of programs. Data can help make a case for the allocation of additional resources and/or investments in other choral music and theatrical performance programming. Sometimes demonstrating certain outputs and outcomes is a requirement of the funder, or of an ethics review process. Demonstrating value of work also adds to the credibility of program models and can lead to beneficial partnerships and collaborations.

What is evaluation?

Broadly speaking, evaluation assesses the value, quality or impact of a given activity/effort. While general evaluation work may have a broad scope, a basic evaluation refers to the work of assessing how programs or services are affecting your target population. More specifically, evaluation of programs refers to a systematic collection of information about the activities, characteristics and outcomes of programs to make judgements about them, improve their effectiveness and inform future decision-making about them.

There are several types of evaluation, but for purposes of this toolkit, the three major types of evaluation that are most useful to understand are process, formative, and outcomes evaluations.

Table 1: Types of Evaluation

Evaluation Type	Description	When Used	Examples of Questions
Process Evaluation	Focuses on the processes and activities involved in planning, implementing or delivering programs or services. Process evaluations help you understand the extent to which programs were implemented as planned.	This type of evaluation is typically conducted during program implementation; it can also inform ongoing evaluation.	▪ Did we implement the program or service as planned, such as number of individuals participating in the program? ▪ If not, why not?
Formative Evaluation	Formative evaluations focus on collecting data that will allow you to make improvements or course corrections as you implement your program or service.	To assist strengthening the program or service mid-course.	▪ What have our challenges been and why did they occur? How have we tried to address them?
Outcomes Evaluation	Outcome evaluations assess whether a program or service is meeting its short and long term results it set out to achieve. Outcome evaluation helps you understand "what happened" as a result of the work you do.	Outcome evaluations measure the results upon completion of activities. They can measure impacts on individuals, groups or systems.	▪ Are visitors more engaged in our programs and activities? ▪ Did participants benefit in the ways that we expected?

Evaluation Process

What are the steps in the evaluation process?

The basic steps of a program evaluation are shown in the figure below. Because program evaluation is cyclical in nature, results of one evaluation report are often used as a guide to update program goals/purposes of the evaluation (if needed) and to prepare for the next evaluation plan.

Planning		Data Collection		Data Analysis		Reporting
▪ Engage key stakeholders in reviewing program activities and outcomes ▪ Develop guiding evaluation questions—what do you want to learn from the evaluation? ▪ Develop a data collection strategy	➡	▪ Develop data collection instruments, with input from key stakeholders ▪ Collect data via surveys, interviews, focus groups, observation, etc.	➡ ⬅	▪ Analyze quantitative and qualitative data ▪ Engage key stakeholders in reviewing and interpreting the data. ▪ Develop a reporting, communication and dissemination strategy (can also be done during planning)	➡ ⬅	▪ Develop rapid feedback, reports, dashboards or other materials ▪ Disseminate evaluation findings to various audiences ▪ Engage key stakeholders in decisions on program revisions or course corrections

Data Collection Methods

Multiple evaluation methods should be explored, as there is no one size fits all approach to many evaluations. Upon exploring data collection methods, there should be as strong commitment to reviewing the approach on a regular basis. Programs and evaluators should be focused on specific questions that are to be addressed in order to find the best approach to data collection. The following tables highlight common data resources, data collection methods, and advantages and considerations in engaging external or internal evaluators.

Evaluations often involve quantitative and qualitative information, i.e. things that can be counted or measured and information that can be used to describe project functions and the people involved. While these terms are described in the glossary as an example, quantitative information may include the number of people served by a program, the number of services provided or even a percentage of a population that are identified as a particular race. An example of qualitative information may give a deeper understanding of quantitative data, such as individual feelings, or challenges faced by a particular group of participants.

Possible Data Sources	
Staff	Program Data
Board Members	Demographic data
Visitors/Clients/Program Participants	Secondary data
Community Members/Leaders	Policy Makers
Partners	Volunteers

Data Collection Methods Most Commonly Used

Method	Description	Advantages	Disadvantages
Surveys	A set of questions administered to a group of people in person, over the phone or online Additionally, tests and assessments can be useful tools in evaluation and allows you to capture information about the needs of a target population.	Can be administered on a large scale if you want to gather a large volume of data. Can be cost effective, especially if done online. Can be timely Can be anonymous	Data about sensitive subject matter such as addictions, violence or suicide is difficult to collect over a survey. Hard to get higher response rates. Limited or no opportunity to clarify questions
Focus Group	A focused discussion with key stakeholders, service users or partners led by a facilitator	Can lead to rich qualitative discussion that can be used to determine key areas of importance for your key stakeholders Can get diverse views in a short period of time	Costly and time consuming depending on how many sessions you wish to host. Expertise of a skilled facilitator is needed to gather data and create a comfortable and safe space
Service (Secondary) Data Reviews	A review of existing data on a program or service captured through service logs and administrative data related to delivery	Provides an objective picture of what is happening and is well suited for process related inquiry	Does not offer much context to explain why your services is performing a certain way
In-Depth (Key informant) Interviews	A one-on-one structured or semi-structured interview where an interviewer guides an in-depth discussion on a subject of interest	Allows for deep reflection on a service and can yield rich qualitative data, including stories Can be done over the phone for convenience Can follow-up if needed	Can be expensive, time consuming and requires a skilled interviewer The information gathered may be very specific to a few people's experiences and not reflect the experience of a larger group Can be difficult to coordinate
Narratives (Stories)	A one-on-one process that allows a subject to share stories often lead by a few open-ended questions, and not as guided as an interview.	Allows individuals to share experiences and personal stories.	Can be time consuming and require a strong qualitative analysis approach in order to extract themes

Observation	Allows for information gathering based on activities of a program. Useful in capturing strengths and opportunities in the operations of a project	Allows for information review. Good for process, context and implementation evaluation.	Requires objectivity and a skilled evaluator.

External vs Internal Evaluation

While there are three types of evaluators: internal, external and internal in collaboration with an external consultant, it is essential to determine what is most beneficial to your project. Combining the skillset and qualities of both evaluator types can offer additional expertise and specialization. Whether an organization decides on an external or internal evaluator, it is essential to be aware of the evaluator's role. Considerations of the type of evaluation, available capacity and resources will aid in this decision. The following table provides several advantages and considerations for using internal and external evaluators.

When engaging an internal evaluator, consider hiring an evaluation consultant to advise your organization. This will be less costly than a full-on external evaluation but will retain many of the positive aspects like expertise and "outside the box" thinking. The program can still retain internal control over the process, and it will be more affordable. Consultants can offer advice on creating a strong evaluation plan for a major project. If engaging an external evaluator consider interviewing the evaluators and assessing expertise. Expertise may be evidenced by having experience evaluating projects similar to yours. Request evidence of a track record or analytical skills. Collaborative skills are essential for both internal and external evaluations.

According to the W.K. Kellogg Foundation Handbook on evaluation, "depending on the primary purpose of the evaluation and with whom the evaluator is working most closely (funders vs. Program staff vs. participants or community members), an evaluator might be considered a consultant for program improvement, a team member with evaluation expertise, a collaborator, an evaluation facilitator, an advocate for a cause, or a synthesizer."

Internal Evaluator	
Advantages	Consideration
Less expensive	May have limited expertise
Internal collaboration	Perceived or actual lack of objectivity
Internal expertise in embedded in a program or organization	Respondent's potential reluctance to be candid, if they are not completely sure of anonymity
Program and/or community familiarity	Program immersion
Have access to organizational resources	

External Evaluator	
Advantages	**Considerations**
Expert level training/Years of experience	May be expensive
Perceived objectivity	Requires extensive collaboration
Outside of the box perspective: being one step removed	May lack affiliation with program and be detached from daily operations of the project
Often contracted from an outside consulting firm or organization specializing in evaluation	
Access to current/new developments in evaluation	

SECTION TWO

MOT Evaluation Tools

Section Two provides tools and instruments developed in alignment with MOT's strategic goals and programmatic activities. It includes the Action and Change Rubrics, which were developed to guide MOT's evaluation efforts based on the organization's strategic priorities and desired outcomes. This section also includes survey instruments that MOT can use to measure progress and results.

Moving the Needle: Action and Change Rubrics

The **Action and Change Rubrics** in this toolkit are part of *Moving the Needle*™ (MTN), a comprehensive system developed by JFM Consulting Group. The Action and Change Rubrics are part of a system that is designed to increase quality stakeholder engagement, ownership and accountability in defining and measuring success. The Rubrics incorporate elements of theory of change, strategic planning and logic models to achieve the following five objectives:

1. **Empower key stakeholders:** Organizational leaders, program staff, collaborative partners, and other stakeholders are empowered to take the lead in defining success. The underlying assumption of MTN is that the stakeholders responsible for planning and implementation, should be empowered to lead the discussion on how success is defined.

2. **Build consensus:** Before determining how success should be defined and measured, there must be consensus and clarity among stakeholders around program goals, strategies and outcomes. It is often assumed that everyone shares the same understanding and assumptions about the program, but frequently, this is not the case. MTN engages stakeholders in a process focused on clarifying and building consensus around program goals, priorities and expectations. This sets the stage for the discussion on defining success. It also provides an opportunity to review the underlying assumptions concerning the

connection between the implementation of a set of strategies and actions, and the change that is expected to result.

3. **Define success:** Developing consensus among stakeholders around how success will be defined. The reality is that 'success' is rarely restricted to a single point on a continuum. Therefore, the MTN system includes Action and Change Rubrics that reflect stakeholder-defined *levels* of success. It is not only possible, it is quite likely that a program or initiative will have some elements that are *extremely* successful, while others may be *moderately* or only *marginally* successful, or possibly not successful at all. Assigning metrics to these levels from the outset is both useful from a planning perspective, eliminating unnecessary guesswork and debates on the back end.

4. **Increase accountability:** The flip side of the empowerment coin is accountability. Having empowered stakeholders to define success, its levels and corresponding metrics, there remains the matter of accountability. Through MTN, 'accountable leadership' is identified, ensuring that accountability for delivering on the stated goals is not left to chance. The potential for confusion at the conclusion of the process, related to whether and why targets may or may not have been met, is removed. There is greater clarity in terms of roles and responsibilities for implementation, and reporting on why or why not targets have been met.

5. **Develop grounded and measurable targets:** Targets and change indicators identified by stakeholders should be grounded programmatically, within a specified timeframe, and having metrics that are realistic and measurable on a practical level. This step in the process helps to ensure that selected targets require a stretch, but are achievable, and that the change or outcomes reflect the priorities identified during the consensus-building part of the process.

A brief description of the two foundational components MTN, the Action and Change Rubrics, is provided below. The Action and Change Rubrics are developed on the *front-end* of the evaluation process, to ensure consensus around what strategies and actions, and to determine what change or results should be, and how.

- *Action Rubric:* The Action Rubric provides a framework for describing the key strategies and *actions* that will take place to produce a desired change or set of outcomes. Illustrated in the first two slides below, the Action Rubric focuses on MOT's overarching strategies and corresponding program actions or activities—specifically, those actions that should contribute to the measurable change that MOT hopes to achieve. Developed with input from program staff, the Action Rubric typically includes metrics that will be used to determine the extent to which a given action is either *Meeting or Exceeding*, *Approaching* or *Below Target*.

- *Change Rubric:* Illustrated in the two slides following the Action Rubric, the Change Rubric provides a framework for describing the *change* or *outcomes* that will result from the actions

or activities described in the Action Rubric. The Change Rubric answers the question, "So what?" It identifies the results that should be achieved, and defines exactly how success will be measured along a continuum that includes *Optimal*, *Moderate*, and *Marginal Change*. The Change Rubric describes the indicators of change and incorporates specific metrics for determining the *degrees* of success.

MICHIGAN OPERA THEATRE
Evaluation Toolkit

MOT 3-Year *Action* Rubric: July 2018 – June 2021
Key Activities & Targets

> **Goal:** Identify and engage new opera and dance fans, attendees, and advocates, with a focus on diversity and inclusion.

Strategy	Below Target	Approaching Target	Meeting or Exceeding Target
Develop Resources and Strategies to Support Engagement	▪ Cultivate at least ___ new sources of funding ▪ Develop ___ new community partners to support engagement of new audiences ▪ Implement at least ___ elements from marketing and engagement strategy, including social media, to reach more diverse audiences (for community programs, MOTCC, main stage programs, etc.)	▪ Cultivate ___ new sources of funding ▪ Develop ___ new community partners to support engagement of new audiences ▪ Implement at least ___ of ___ elements from marketing and engagement strategy, including social media, to reach more diverse audiences (for community programs, MOTCC, main stage programs, etc.)	▪ Cultivate at least ___ new sources of funding ▪ Develop ___ new community partners to support engagement of new audiences ▪ Implement at least ___ of ___ elements from marketing and engagement strategy, including social media, to reach more diverse audiences (for community programs, MOTCC, main stage programs, etc.)
Cultivate Opportunities to Engage People Emotionally	▪ Implement at least ___ programs/events designed to emotionally connect with new, inclusive audiences ▪ Identify at least ___ opportunities focused on encouraging MOT supporters to invite friends/family to attend an opera, dance or other MOT event	▪ Implement ___ programs/events designed to emotionally connect with new, inclusive audiences ▪ Identify ___ opportunities focused on encouraging MOT supporters to invite friends/family to attend an opera, dance or other MOT event	▪ Implement at least ___ programs/events designed to emotionally connect with new, inclusive audiences ▪ Identify at least ___ opportunities focused on encouraging MOT supporters to invite friends/family to attend an opera, dance or other MOT event
Connect with and Engage People Educationally	▪ Identify at least ___ new opportunities to educate adult visitors through the opera ▪ Engage at least ___ Detroit schools through performances and workshops ▪ Engage at least ___ Detroit students	▪ Identify ___ new opportunities to educate adult visitors through the opera ▪ Engage ___ Detroit schools through performances and workshops ▪ Engage ___ Detroit students	▪ Identify at least ___ new opportunities to educate adult visitors through the opera ▪ Engage at least ___ Detroit schools through performances and workshops ▪ Engage at least ___ Detroit students

MICHIGAN OPERA THEATRE
Evaluation Toolkit

MOT 3-Year *Action* Rubric: July 2018 – June 2021
Key Activities & Targets

> **Goal:** Identify and engage new opera and dance fans, attendees, and advocates, with a focus on diversity and inclusion.

Strategy	Below Target	Approaching Target	Meeting or Exceeding Target
Engage People Financially	▪ Provide opportunities in at least ____ community events for visitors to make a donation or purchase a ticket to a mainstage performance ▪ Engage at least ____ current MOT supporters (volunteers, Opera Club members, etc.) in identifying new MOT volunteers and/or donors	▪ Provide opportunities in ____ community events for visitors to make a donation or purchase a ticket to a mainstage performance ▪ Engage ____ current MOT supporters (volunteers, Opera Club members, etc.) in identifying new MOT volunteers and/or donors	▪ Provide opportunities in at least ____ community events for visitors to make a donation or purchase a ticket to a mainstage performance ▪ Engage at least ____ current MOT supporters (volunteers, Opera Club members, etc.) in identifying new MOT volunteers and/or donors
Create Advocates for Opera and Dance	▪ Engage at least ____ Opera Club members in exposing and/or advocating for MOT or the opera to friends, family and colleagues ▪ Engage MOT volunteers in at least ____ opportunities to expose and/or advocate for MOT or the opera to friends, family and colleagues	▪ Engage ____ Opera Club members in exposing and/or advocating for MOT or the opera to friends, family and colleagues ▪ Engage MOT volunteers in ____ opportunities to expose and/or advocate for MOT or the opera to friends, family and colleagues	▪ Engage at least ____ Opera Club members in exposing and/or advocating for MOT or the opera to friends, family and colleagues ▪ Engage MOT volunteers in at least ____ opportunities to expose and/or advocate for MOT or the opera to friends, family and colleagues
Monitor Progress Toward Overall Goal	▪ Engage at least ____ new visitors and advocates that advance MOT's commitment to diversity and inclusion ▪ Cultivate at least ____ new donors that help meet MOT's commitment to diversity and inclusion	▪ Engage ____ new visitors and advocates that advance MOT's commitment to diversity and inclusion ▪ Cultivate ____ new donors that help meet MOT's commitment to diversity and inclusion.	▪ Engage at least ____ new visitors and advocates that advance MOT's commitment to diversity and inclusion ▪ Cultivate at least ____ new donors that help meet MOT's commitment to diversity and inclusion

MICHIGAN OPERA THEATRE
Evaluation Toolkit

MOT 3-Year *Change* Rubric: July 2018 – June 2021
Key Activities & Targets

> **Goal:** Identify and engage new opera and dance fans, attendees, and advocates, with a focus on diversity and inclusion.

Change	Below Target (minimal change)	Approaching Target (moderate change)	Meeting or Exceeding Target (optimal change)
Increased Connections with New Audiences	▪ At least __% of visitors will attend the opera or a dance performance for the first time ▪ At least __% of new visitors will report hearing about MOT events through social media ▪ AT least __% visitors will attend MOT events as a result of MOT community partnerships (the partners audience)	▪ __% of visitors will attend the opera or a dance performance for the first time ▪ __% of new visitors will report hearing about MOT events through social media ▪ __% visitors will attend MOT events as a result of MOT community partnerships (the partners audience)	▪ At least __% of visitors will attend the opera or a dance performance for the first time ▪ At least __% of new visitors will report hearing about MOT events through social media ▪ AT least __% visitors will attend MOT events as a result of MOT community partnerships (the partners audience)
More Visitors are Emotionally Engaged	▪ At least __% of visitors report being touched or feel connected emotionally from their first opera experience ▪ At least ___% of visitors/students report that they relate to the "stories" being told or the characters ▪ At least __% of visitors report feeling more curious about interested in attending opera or dance in the future	▪ __% of visitors report being touched or feel connected emotionally from their first opera experience ▪ ___% of visitors/students report that they relate to the "stories" being told or the characters ▪ __% of visitors report feeling more curious about interested in attending opera or dance in the future	▪ At least __% of visitors report being touched or feel connected emotionally from their first opera experience ▪ At least ___% of visitors/students report that they relate to the "stories" being told or the characters ▪ At least __% of visitors report feeling more curious about interested in attending opera or dance in the future
Increased Student/ Visitor Knowledge	▪ At least __% of participating classrooms/schools will be new ▪ At least __% of students/visitors will report learning something new through MOT events or the opera	▪ __% of participating classrooms/schools will be new ▪ __% of students/visitors will report learning something new through MOT events or the opera	▪ At least __% of participating classrooms/schools will be new ▪ At least __% of students/visitors will report learning something new through MOT events or the opera

MICHIGAN OPERA THEATRE
Evaluation Toolkit

MOT 3-Year *Change* Rubric: July 2018 – June 2021
Key Activities & Targets

Goal: Identify and engage new opera and dance fans, attendees, and advocates, with a focus on diversity and inclusion.

Change	Below Target (minimal change)	Approaching Target (moderate change)	Meeting or Exceeding Target (optimal change)
Increase Individuals' Financial Engagement	■ At least __% of individual donors will be new ■ At least __% of ticket buyers increase their engagement and/or purchases ■ Donations or tickets to a mainstage performance purchased at a community event will increase by at least __%	■ __% of individual donors will be new ■ __% of ticket buyers increase their engagement and/or purchases ■ Donations or tickets to a mainstage performance purchased at a community event will increase by __%	■ At least __% of individual donors will be new ■ At least __% of ticket buyers increase their engagement and/or purchases ■ Donations or tickets to a mainstage performance purchased at a community event will increase by at least __%
Cultivate Advocates for Opera and Dance	■ At least __% of new visitors report that they were invited to attend by a friend, colleague or family member ■ At least __% current visitors will feel moved to inspire or invite others to the opera or dance ■ Individuals exposed to/invited by Opera Club members will increase by at least ___%	■ __% of new visitors report that they were invited to attend by a friend, colleague or family member ■ __% current visitors will feel moved to inspire or invite others to the opera or dance ■ Individuals exposed to/invited by Opera Club members will increase by ___%	■ At least __% of new visitors report that they were invited to attend by a friend, colleague or family member ■ At least __% current visitors will feel moved to inspire or invite others to the opera or dance ■ Individuals exposed to/invited by Opera Club members will increase by at least ___%
Increased Diversity and Inclusion	■ Outreach to individuals from under-represented groups through community partnerships will increase by at least ___ % ■ Revenue from new under-represented donors/ticket buyers surveyed will increase by at least ___%	■ Outreach to individuals from under-represented groups through community partnerships will increase by ___ % ■ Revenue from new under-represented donors/ticket buyers surveyed will increase by___%	■ Outreach to individuals from under-represented groups through community partnerships will increase by at least ___ % ■ Revenue from new under-represented donors/ticket buyers surveyed will increase by at least ___%

MICHIGAN OPERA THEATRE
Evaluation Toolkit

Data Collection Instruments

To better support MOT's commitment to monitoring and evaluation, JFM engaged program staff in the development of data collection instruments that can be used in part, or as a whole, in the evaluation of opera and dance programs. The survey questions are designed to be adapted to fit the range of programs and activities offered by MOT. The table below summarizes the various survey instruments and the type of data it is designed to collect. Examples of the instruments are provided on the pages that follow.

Survey Instrument	Purpose	Data Focus
Visitor Survey	▪ To learn more about MOT visitor's experience ▪ To identify opportunities to strengthen and improve programming ▪ To support MOT's monitoring of progress toward strategic goals, such as increased emotional engagement	▪ Visitor outreach and engagement ▪ Visitor experience ▪ Visitor demographics
Educational Survey	▪ To measure the effectiveness of MOT's school-based programming ▪ To measure exposure to other MOT arts and culture activities ▪ To identify opportunities to improve educational programs	▪ Student perceptions of performances, workshops and/or special programs ▪ Awareness of/exposure to other MOT arts programming ▪ Student demographics
MOT Partner Survey	▪ To learn more about MOT partners' experience across programming partnerships ▪ To identify opportunities for improvement	▪ History partnering with MOT ▪ Partner experience
MOT Volunteer Survey	▪ To learn more about the individuals who volunteer for MOT ▪ To measure the quality of their volunteer experience ▪ To monitor the role volunteers can play in advocating on behalf of MOT ▪ To identify opportunities for improvement	▪ Volunteer background ▪ Volunteer experience ▪ Volunteer connections ▪ Demographics
Staff Survey	▪ To capture MOT staff perceptions of the planning and implementation of programs ▪ To learn more about the effectiveness of internal communications around programs ▪ To identify opportunities for improvement and course correction in future programs	▪ Perceptions of and satisfaction with level of engagement in programs ▪ Clarity of roles implementing program ▪ Communication of progress and results

Post-Opera and/or Dance Performance Visitor Survey

Visitor Outreach and Engagement

1. How you heard about _____ Please select all that apply.
    ___ Friend, family or colleague
    ___ Radio or TV
    ___ Mail
    ___ Email
    ___ Social media (Facebook, Twitter, etc.)
    ___ MOT website
    ___ Other (please describe) _____

2. Is this your first MOT _____ (dance/opera) performance?
    ___ Yes   ___ No

3. If NO, including today, about how many MOT dance and/or opera events have you attended in the last <u>two</u> years?
    ___ 2 – 3
    ___ 4 – 5
    ___ 6 – 8
    ___ More than 8

4. Which of the following <u>best</u> describes your decision to attend this event? Did you attend today's performance…
    ___ I came by myself
    ___ I was invited by friends, family or colleagues
    ___ I <u>invited</u> my friend(s), family or colleague(s) to join me
    ___ I am attending as part of a group or organization (civic, social, professional, etc.)
    ___ I am attending as part of my job and/or to represent my company or organization

5. Please select the <u>three</u> most important reasons that you attended today's performance.
    ___ To spend quality time with friends, family or colleagues
    ___ To expose others to the artistic experience
    ___ To discover something new
    ___ To see an opera/dance company that I like
    ___ To be emotionally moved or inspired
    ___ To relax or escape
    ___ For work or educational purposes
    ___ Other (please specify)_____

Post-Opera and/or Dance Performance Visitor Survey

Visitor Experience

6. Before today's performance, how familiar were you with…

	Very Familiar	Somewhat Familiar	Not Very Familiar	Not Familiar at All
a. Opera/dance in general				
b. This particular opera/dance				

7. About how much would you say that you were looking forward to this performance?

Very Much	Somewhat	Not Very Much	Not at All

8. Please indicate how true the following statements are for you.

	Very True	Somewhat True	Not Very True	Not True at All
a. I really enjoyed the performance.				
b. I was very absorbed in the performance.				
c. The performance really engaged me intellectually.				
d. I could relate to the story and/or identify with the characters [or the dancers].				
e. I was very impressed with the skill and artistry of the opera singers/dancers				
f. This performance was informative and/or gave me new insights .				
g. The performance makes me want to attend (or continue attending) opera/dance in the future.				

9. Thinking about the performance, how true are the following statements for you?

	Very True	Somewhat True	Not Very True	Not True at All
a. I understood what the artists were trying to convey.				
b. I felt a sense of connection with others in the audience.				
c. I hardly noticed the time passing.				

d. I found aspects of the performance very moving.				
e. I learned about *other* cultures and/or appreciated the reflection of *my* cultural heritage.				
f. This performance reinforced or increased my appreciation of opera/dance.				
g. I am really glad that I came.				

10. Did you leave this performance with unanswered questions that you would have liked to ask the performers, composer or creators of the work?

___ Yes   ___ No

11. How likely are you to recommend this opera/dance to friends, colleagues and/or family?

___ Very likely   ___ Somewhat likely   ___ Somewhat unlikely   ___ Not very likely

12. Based on this experience, I will seek out other opportunities to experience more stories told through opera.

___ Very Likely   ___Somewhat likely   ___Somewhat Unlikely   ___Not very likely

13. How important is it for someone to experience opera/dance?

___ Very important   ___ Somewhat important   ___Somewhat unimportant   ___ Not very important

14. Concerning the performance overall, would you say that you were…
___ Very impressed   ___ Somewhat impressed   ___ Not very impressed   ___ Not impressed at all

15. What did you enjoy or appreciate the <u>most</u> about the performance?

16. Thinking about future productions, can you think of anything that MOT might consider doing differently?

Post-Opera and/or Dance Performance Visitor Survey

Demographics

17. What is your age?
   - ☐ Under 18 years
   - ☐ 18-24 years
   - ☐ 25-34 years
   - ☐ 35-44 years
   - ☐ 45-54 years
   - ☐ 55-64 years
   - ☐ 65 years or more

[Alternatively, you could ask their exact age.]

18. What year were you born? _____

19. What is your gender?
   - ☐ Female
   - ☐ Male
   - ☐ Prefer to self-describe : _____

20. What race(s)/ethnicities do you identify with? Please select all that apply.
   - ☐ African American or Black
   - ☐ American Indian and Alaska Native
   - ☐ Arab/Middle Eastern
   - ☐ Asian/Native Hawaiian/Pacific Islander
   - ☐ Hispanic/Latino
   - ☐ White
   - ☐ Some other race
   - ☐ Prefer not to answer

Post-Opera and/or Dance Performance Visitor Survey

21. Which of the following _best_ describes your current working status? Please select _one_.
___ Currently working for pay
___ Looking for work
___ Full-time family caregiver
___ Volunteering my time
___ Retired
___ Student

22. What is the highest level of education that you completed?
___ High school or less
___ Beyond high school, such as community college or trade school, but less than a university degree
___ Bachelor's degree
___ Graduate or professional degree

23. About how far did you travel to get here today?
___ Less than 5 miles
___ About 6-10 miles
___ 10-20 miles
___ 21-30 miles
___ More than 30 miles

24. In terms of travel time, about how long did it take you to get here today?

___ Less than 15 minutes
___ About 15-30 minutes
___ About 30 – 60 minutes
___ More than 60 minutes

Post-Opera and/or Dance Performance Visitor Survey

25. During the past six months, about how many times would you say that you have encouraged friends, family, colleagues, groups or organizations to attend an MOT (dance/opera) performance?

____ None

____ Maybe once

____ 2 or 3 times

____ At least 4 times

26. Have you donated to MOT….

____ This year

____ Last year

____ I have not made a donation to MOT this year or last year

27. Have you subscribed to MOT…

____ This year

____ Last year

____ I have subscribed to MOT this year or last year

28. Are you a member of the Opera Club?

____ Yes   ____ No

29. Have you served as a volunteer for MOT during the last two years?

____ Yes   ____ No

30. Is there anything else you would like to share?

Thank you for your time!

MICHIGAN OPERA THEATRE
Evaluation Toolkit

Middle and High School Student Post-Event Survey

PERFORMANCE QUESTIONS

1. Thinking about the performance you saw, how true are the following statements for you? Please circle only *one* number for each statement.

	Very True	Somewhat True	Not Very True	Not True at All	Don't Know
a. I really enjoyed the performance today.	1	2	3	4	5
b. I could follow the "story" that was being told through opera/dance.	1	2	3	4	5
c. I learned something new from this performance.	1	2	3	4	5
d. I would like to learn more about the topics addressed in this performance.	1	2	3	4	5
e. I would be interested in attending/participating in other MOT performances.	1	2	3	4	5

WORKSHOP QUESTIONS

2. How much do you agree or disagree with the following statements about this workshop? Please circle only *one* number for each statement.

	Strongly Agree	Somewhat Agree	Somewhat Disagree	Strongly Disagree	Don't Know
a. The workshop was interesting.	1	2	3	4	5
b. I had a chance to participate in different activities.	1	2	3	4	5
c. I felt free to ask questions of the presenter.	1	2	3	4	5
d. The information presented was clear and easy to understand.	1	2	3	4	5
e. I would be interested in participating in other MOT workshops like this.	1	2	3	4	5

Middle and High School Student Post-Event Survey

SPECIAL PROGRAMS/RESIDENCY PROGRAM QUESTIONS

3. How much do you agree or disagree with the following statements? Please circle only *one* number for each statement.

	Strongly Agree	Somewhat Agree	Somewhat Disagree	Strongly Disagree	Don't Know
f. I learned new things about music, performance, theatre, and/or poetry.	1	2	3	4	5
g. I improved my skills as an artist through this project.	1	2	3	4	5
h. I learned new and better ways to express myself.	1	2	3	4	5
i. I feel more confident in discussing culture and history.	1	2	3	4	5
j. I can apply some of the things I learned in other areas of my life.	1	2	3	4	5

AWARENESS/EXPOSURE QUESTIONS

4. I had heard about the Michigan Opera Theatre before participating in this program/attending this performance.
   ___ Yes   ___ No

5. Before participating in this program, I have seen an opera or heard opera music before participating in this program/attending this performance.
   ___ Yes   ___ No

6. I have attended other MOT school events in the past.   ___ Yes   ____ No   ____

7. I have friends or family who have been to the opera *or* enjoy opera music.
   ___ Yes   ___ No   ____ Not sure

8. If I had an opportunity to attend another MOT event, I think that I would go.
   ___ Yes   ____ No   ____ Not sure

Middle and High School Student Post-Event Survey

IMPROVEMENT QUESTIONS

9. What did you enjoy the most about the performance/workshop/program?

10. What, if anything would you change or do differently to improve it?

DEMOGRAPHIC QUESTIONS

11. What is your grade?
    (*Middle school*)
    ☐ 7th
    ☐ 8th

    (*High school*)
    ☐ 9th
    ☐ 10th
    ☐ 11th
    ☐ 12th

12. What is your gender?
    ☐ Male
    ☐ Female
    ☐ Prefer to self-describe: _____
    ☐ Prefer not to respond

13. What race(s)/ethnicities do you identify with? Please select all that apply.

☐ African American or Black	☐ Hispanic/Latino
☐ American Indian and Alaska Native	☐ White
☐ Arab/Middle Eastern	☐ Some other race
☐ Asian/Native Hawaiian/Pacific Islander	☐ Prefer not to answer

THANK YOU!!

MOT Partner Survey

HISTORY

1. Is this the first time that your organization has partnered with the Michigan Opera Theatre (MOT)?
   ___ Yes   ___ No   ___ Don't know/Not sure

2. If "No", not including this partnership, about how many times has your organization partnered with MOT in the last three (3) years?
   ___ 1   ___ 2   ___ 3 ____ 4 or more

EXPERIENCE

3. Thinking about your organization's recent _____ partnership with MOT, please indicate the extent which you agree with the following statements.

	Strongly Agree	Somewhat Agree	Somewhat Disagree	Strongly Disagree	Not Sure/ Don't Know
a. There was clarity concerning _your organization's role_ in the partnership.	○	○	○	○	○
b. There was clarity concerning MOT's role in the partnership.	○	○	○	○	○
c. MOT provided all of the information that we needed to ensure a smooth partnership.	○	○	○	○	○
d. The _frequency_ of communication from MOT staff was just right—not too often, but frequent enough.	○	○	○	○	○
e. The "_fit_" between our organization and MOT on this project was very good.	○	○	○	○	○

4. What benefits or results was your organization _hoping to achieve_ from this partnership with MOT? Please list _up to three_ benefits or results that your organization hoped to achieve.

1.	
2.	
3.	

MOT Partner Survey

5. Overall, to what extent would you say that these benefits or results were achieved through this partnership with MOT? Were they achieved…

Completely or to a Great Extent	To a Moderate Extent	To a Limited or Small Extent	To a Minimal Extent or Not at All	Not Sure/ Don't Know
O	O	O	O	O

6. What did you *appreciate the most* from your organization's partnership with MOT? Please list *up to three* things.

1.	
2.	
3.	

7. What did you find to be <u>difficult</u> <u>or challenging</u>, if anything, concerning your partnership with MOT on Take Me Out to the Opera? Please list *up to three* things.

1.	
2.	
3.	

8. Is there anything that you can think of would have made your partnership with the MOT more successful?

    _____

    _____

9. If the right opportunity presents itself, would you be interested in partnering with MOT on other projects in the future?

    ___Yes ___No ___Not Sure

10. If "No" or "Not Sure", please provide additional detail.

_____

_____

11. Is there anything else you would like to share?

_____

_____

THANK YOU!

<p style="text-align:center; color:red;">

MICHIGAN OPERA THEATRE
Evaluation Toolkit

MOT Volunteer Engagement Survey
</p>

VOLUNTEER BACKGROUND

1. About how long have you been a Michigan Opera Theatre (MOT) volunteer ? Please select the best response.
   □ 6 months or less
   □ 7 to 12 months
   □ 1 to 2 years
   □ 3 to 5 years
   □ More than 5 years

2. What led to your becoming a volunteer for MOT? Please check all that apply.
   ☐ I was encouraged or asked by MOT staff
   ☐ I was encouraged or asked by an MOT volunteer
   ☐ I learned about it through the MOT website
   ☐ I heard about the opportunity through work
   ☐ I heard about it through social media
   ☐ I was aware of MOT and became a volunteer on my own
   ☐ Other (please describe):

   _____

3. Have you served as a volunteer for MOT during the previous 12 months?
   ___ Yes   ___ No

4. [IF YES] Please select the role(s) you have served in with MOT. Please check all that apply
   ___ Opera House Usher: Assists with taking tickets and seating patrons
   ___ Young Professional: meet and socialize with others, and coordination of fundraising events
   ___ Opera House Ambassadors: Share expertise and history
   ___ Boutique volunteer: Assists in the selling of MOT merchandise
   ___ Dance Council: Build an audience for dance at the Opera House
   ___ Divas and Divos: Introduce visiting artists to Detroit and make their stay more enjoyable
   ___ Planning
   ___ Other, please
   specify:_____

5. _During the MOT dance/opera season_, about how many hours would you say that you spend _in an average month_ volunteering for MOT?
   □ 5 hours or less
   □ Between 6 and 10 hours
   □ Between 11 and 20 hours
   □ More than 20 hours/month

MOT Volunteer Engagement Survey

VOLUNTEER EXPERIENCE

6. Thinking about your volunteerism with MOT, please indicate the extent which you agree with the following statements.

	Strongly Agree	Somewhat Agree	Somewhat Disagree	Strongly Disagree	Not Sure/ Don't Know
MOT provides a positive climate of teamwork among its volunteers	O	O	O	O	O
Volunteering with MOT provides a sense of accomplishment	O	O	O	O	O
MOT provides the needed support and guidance to accomplish volunteer activities	O	O	O	O	O
MOT provided the information that we needed as a volunteer a timely fashion.	O	O	O	O	O
MOT offers opportunities to provide additional support.	O	O	O	O	O

7. What do you enjoy the most about volunteering with MOT? Please list up to three things.

1.	
2.	
3.	

8. What, if anything, would you change to improve your experience as a volunteer? Please list up to three things.

1.	
2.	
3.	

9. Overall, how satisfied are you with the MOT volunteer program that you are participating in?

____ Very Satisfied   ____ Somewhat Satisfied   ____ Somewhat Not Satisfied   ____ Not Satisfied at All

MOT Volunteer Engagement Survey

VOLUNTEER CONNECTIONS

10. In the last 12 months, have you…?

	Yes	No	Don't Recall
Mentioned MOT to friends, family or colleagues, for any reason?	O	O	O
Invited or encouraged friends, family or colleagues to attend an MOT dance/opera performance?	O	O	O
Yourself attended an MOT dance/opera performance as a visitor and not a volunteer?	O	O	O

11. How likely are you to ….

	Very Likely	Somewhat Likely	Not Very Likely	Not Likely At All	Not Sure/ Don't Know
Continue volunteering with MOT in the future?	O	O	O	O	O
Invite or continue inviting friends, family or colleagues to attend MOT performances and events?	O	O	O	O	O

12. Is there anything else you would like to share?

_____

_____

DEMOGRAPHICS

13. What is your highest level of education completed?
- ☐ Less than high school
- ☐ High School Graduate
- ☐ Some College
- ☐ College Graduate
- ☐ Graduate or Professional School

14. What is your gender?
- ☐ Male (Man)
- ☐ Female (Woman)
- ☐ Transgender
- ☐ Prefer to self-describe: _____
- ☐ Prefer not to respond

MOT Volunteer Engagement Survey

15. What race(s)/ethnicities do you identify with? Please select all that apply.
   - ☐ African American or Black
   - ☐ American Indian and Alaska Native
   - ☐ Arab/Middle Eastern
   - ☐ Asian/Native Hawaiian/Pacific Islander
   - ☐ Hispanic/Latino
   - ☐ White
   - ☐ Some other race
   - ☐ Prefer not to answer

16. Which category includes your current age?
   - ☐ 18 and under
   - ☐ 19 to 24
   - ☐ 25 to 39
   - ☐ 40 to 54
   - ☐ 55 to 59
   - ☐ 60 to 64
   - ☐ 65 and over

THANK YOU!!

MICHIGAN OPERA THEATRE
Evaluation Toolkit

MOT Educational Staff & Artist Survey

Staff Engagement

1. How did you first learn about the _____ project? _____

    _____

2. To what extent were you involved in any aspect of the _development_ of this project?

To a great extent	○
Somewhat	○
To a little extent	○
Very little/not at all	○

    If yes, which aspect(s)? _____

3. To what extent were you involved in any aspect of the _implementation_ of this project?

To a great extent	○
Somewhat	○
To a little extent	○
Very little/not at all	○

    If yes, which aspect(s)? _____

4. To what extent do you agree with the following statements about your level of involvement with this project?

	Strongly agree	Somewhat agree	Somewhat disagree	Strongly disagree
I would like to have been _more_ involved in the project	○	○	○	○
I have skills that I _could have_ used to contribute to this project that have not been fully utilized	○	○	○	○

5. Thinking about the roles and responsibilities of this project, to what extent were you clear about….

	Very clear	Somewhat clear	Not very clear	Not clear at all
My role(s) and responsibilities in this project	○	○	○	○
My colleagues' roles and responsibilities	○	○	○	○

MOT Educational Staff & Artist Survey

Staff Experience

6. Thinking about your experience as a staff member or artist working in this program, to what extent do you agree with the following statements.

	Strongly agree	Somewhat agree	Somewhat disagree	Strongly disagree	Not Applicable
I received the support that I needed in order to do my job well.	○	○	○	○	○
I observed the progress or changes in the students that I hoped to see.	○	○	○	○	○

7. Overall, what would you say were the greatest strengths of this program? What worked well?

8. What, if anything, would you change to improve the program in the future?

Communication

9. If you were asked to explain the following aspects of this project, how confident would you be in your knowledge of the following aspects of the project?

	Very confident	Somewhat confident	Not very confident	Not confident at all
Overall project	○	○	○	○
Goals of the project	○	○	○	○
Activities involved in the project	○	○	○	○

10. How satisfied are you with the level of information you have received about the project (e.g., new developments, regular progress updates on the project)?

I received just the right amount of information	○
I did not received enough information	○
I have received too much information	○

MOT Educational Staff & Artist Survey

11. How well informed are you of the results of this project?

Very well informed	O
Somewhat well informed	O
Not very well informed	O
Not well informed at all	O

12. What types of communications tools would be helpful in keeping you informed about the project? (Check all that apply)

Email updates	O
Virtual/online place/command center with project resources and information	O
Staff meetings	O
Other (please describe):	O

13. Looking back, what, if anything, would you change or do differently concerning this project?

_____

_____

THANK YOU!!

TOOLKIT APPENDIX

- References and Additional Evaluation Resources

- Glossary of Terms

- Evaluation Readiness Checklist

References and Additional Evaluation Resources

Approaches to Evaluation. Retrieved from: http://www.betterevaluation.org/en/approaches

Canadian International Development Agency. Participatory evaluation. Retrieved from:
https://www.oecd.org/derec/canada/35135226.pdf

Center for Innovation in Campus Mental Health, (2018, April 19). Evaluation toolkit, Retrieved from:
https://campusmentalhealth.ca/toolkits/evaluation/

Davidson, E. J. (2005). *Evaluation methodology basics: The nuts and bolts of sound evaluation.* Thousand   Oaks, CA:
Sage.

Evaluation: What is it and why do it? Retrieved from: http://meera.snre.umich.edu/evaluation-what-it-   and-why-do-it

Different Types of Evaluation: Retrieved from: https://cyfar.org/different-types-evaluation

Innoweave. Development Evaluation learning module: Retrieved from:
http://www.innoweave.ca/en/modules/developmental-evaluation

Paloma-Wellesley (2010). Working Together: The Paloma-Wellesley Guide to Participatory Program
Evaluation. Toronto: Paloma Foundation and Wellesley Institute

Parkhurst, Marcie; Preskill, Hallie; Lynn, Jewla & Moore, Marah. (2018) The case for development
evaluation. Retrieved from: https://www.fsg.org/blog/case-developmental-evaluation

Scriven, M. (1991). *Evaluation thesaurus.* Newbury Park, CA: Sage.

Stufflebeam, D. L. & Coryn. C. L. S. (2014). *Evaluation theory, models, and applications* (2nd ed.) San Francisco:
Jossey-Bass.

Western Michigan University Evaluation Center (2018) Retrieved from:
www.wmich.edu/evaluation/checklists

What Works, The Tangata Whenua Community & Voluntary Sector Research Center. Core
principles of empowerment evaluation: Retrieved from:
http://whatworks.org.nz/frameworksapproaches/empowerment-evaluation/

WK Kellogg Foundation. (November 29, 2017) WK Kellogg Foundation Evaluation Handbook.

Yarbrough, D. B., Shulha, L.M. Hopson, R. K. & Caruthers, F. A. (2011). *The program evaluation standards: A guide
for evaluators and evaluation users (*3rd ed.). Los Angeles: Sage.

Zint, Micheala Before you get started. Retrieved from: http://meera.snre.umich.edu/step1

MICHIGAN OPERA THEATRE
Evaluation Toolkit

Evaluation Key Terms
(Resource: Western Michigan University, WKKF, University of Wisconsin-Extension)

Accountability: Responsibility for effective and efficient performance of programs. Measures of program accountability focus on (1) benefits accruing from the program as valued by customers and supports (2) how resources are invested, and the results attained. Obligation to demonstrate that work has been conducted in compliance with agreed rules and standards or to report fairly and accurately on performance results vis a vis mandated role and/or plan

Anonymity: An attempt to keep the participants unknown to the people who use the evaluation and if possible, the investigators themselves.

Activities: Actions taken, or work performed through which inputs, such as funds, technical assistance and other types of resources are mobilized to produce specific outputs.
- Developing products: materials, educational curricula, websites, communications
- Providing services: counseling, programs, trainings, etc.
- Building relationships: networks or partnerships
- Engaging in advocacy or research: conducting policy campaign, issuing research reports
- Building infrastructure: strengthening governance and managing structures, building capacity

Assessment: a) A judgment that you make about a person or situation after considering all the information; b) A calculation of how much something will cost to repair, how much something is worth, how much money someone should be given etc.; could also refer to a tool used to assess a situation or program.

Baseline: Information about the situation of condition prior to a program or intervention. A baseline assessment for example, is administered usually at a client intake or program start.

Benchmarks: Reference point or standard against which performance or achievements can be assessed. A benchmark refers to the performance that has been achieved in the recent past by other comparable organizations, or what can be reasonably inferred to have been achieved in the circumstances.

Confidentiality: An attempt to remove any element that might indicate the subject's identity. For example, not sharing a respondent's name in a report.

Cost benefit analysis: Process to eliminate the overall cost and benefit of a program or components within a program. Seeks to answer the question.

Developmental Evaluation: Evaluation in which the evaluator is part of a collaborative team that monitors what is happening in a program, both processes and outcomes, in an evolving, changing environment of constant feedback and change.

Effectiveness: Degree to which the program yields desired/desirable results.

Efficiency: Comparison of outcomes to costs.

Evaluation: Systematic inquiry to inform decision-making and improve programs. Systematic implies that the evaluation is a thoughtful process of asking critical questions, collecting appropriate information, and then analyzing and interpreting the information for a specific use and purpose.

Evidence: The available body of facts or information indicating whether a belief or proposition is true or valid.

Formative Evaluation: Evaluation intended to improve performance, most often conducted during the implementation phase of projects or programs. Formative evaluations may also be conducted for other reasons such as compliance, legal requirements or as part of a larger evaluation initiative.

Impact: The social, economic, and/or environmental effects or consequences of the program. Impacts tend to be long-term achievements. They may be positive, negative or neutral; intended or unintended.

Impact evaluation: A type of evaluation that determines the net causal effects of the program beyond its immediate results. Impact evaluation often involves a comparison of what appeared after the program with what would have appeared without the program.

Implementation evaluation: Evaluation activities that document the evolution of a project and provide indications of what happens within a project and why. Project directors use information to adjust current activities. Implementation evaluation involves close monitoring of program delivery.

Indicator: Expression of what is/will be measured or described; evidence which signals achievement Answers the question, "How will I know it?"

Inputs: Resources that go into a program including staff time, materials, money, equipment, facilities, volunteer time.

Level of Significance: The probability that a result will not be produced by chance alone; ranges in value from .000 to 1.0.

Logic model: A visual representation, provides a road map showing the sequence of related events connecting the need for a planned program with the programs' desired outcomes and results. A program logic model links outcome (both short- and long-term) with program activities/processes and the theoretical assumptions/principles of the program.
- A logic model can help to identify the factors that will affect the program and to anticipate the resources that will be needed for success.
-

Measure/Measurement: Representation of quantity or capacity. IN the past, these terms carried a quantitative implication of precision and, in the field of education, were synonymous with testing and instrumentation. Today. The term "measure" is used broadly to include quantitative and qualitative information to understand phenomenal under investigation.

Metric(s): Standards of measurement by which efficiency, performance, progress, or quality of a plan, process, or product can be assessed.

Mixed Methods: The use of both qualitative and quantitative methods to study phenomena. These two sets of methods can be used simultaneously or at different states of the same study.

Monitoring: Ongoing tracking of the extent to which a program is operative consistent with its design or program model.

Outcome evaluation: A type of evaluation to determine what results from a program; often used to assess the extent to which a program achieves its outcome-oriented objectives.

Outcome monitoring: the regular or periodic reporting of program outcomes in ways that stakeholders can use to understand and judge results. Outcome monitoring exists as part of program design and provides frequent and public feedback on performance.

Outcomes: Results or changes of the program. Outcomes answer the questions, "So what?" ad "What difference does the program make in people's lives?" Outcomes may be intended or unintended; positive or negative. Outcomes fall along a continuum from short-term/immediate/initial/proximal, to medium-term/intermediate, to long-term/final outcomes, often synonymous with impact.
- Outcomes should express the results that a program plans to achieve if implemented as expected & can be inclusive of different types of change including individual or organizational.
- Short-term outcomes should be attainable within 1-3 years
- Intermediate outcomes should be attainable within a 4-6-year timeframe.
- Long-term outcomes or impact should be attainable within about 7-10 years.

Outputs: Activities, services, events, products, participation generated by a program.
- Outputs should be measurable, tangible and be the direct products or results of program activities.
- Outputs could be actual numbers or predictions about how the program is expected to unfold.

Participatory Evaluation: Evaluation in which the perspective of the evaluator carries no more weight than other stakeholders, including participants and the evaluation process and its results are relevant and useful to stakeholders for future actions. Participatory approaches attempt to be practical, useful and empowering to multiple stakeholders and actively engage all stakeholders in the evaluation process.

Performance Evaluation: The regular measurement of results and efficiency of services or programs.

Performance targets: The expected result or level of achievement; often set as numeric levels of performance.

Probability: The likelihood of an event or relationship occurring, the value of which will range from 0 (never) to 1 (always).

Process Evaluation: A type of evaluation that examines what goes on while a program is in progress. It assesses what the program is.

Qualitative analysis: The use of systematic techniques to understand, reduce, organize and draw conclusions from qualitative data.

Qualitative data: Data that are thick in detail and description; usually in a textual or narrative format.

Quantitative analysis: The use of statistical techniques to understand quantitative data and to identify relationships between and among variables.

Quantitative data: Data in numeric format.

Quasi-Experimental design: A methodology in which research subjects are assigned to treatment and comparison groups typically through some sort of matching strategy that attempts to minimize the differences between the two groups in order to approximate random assignment.

Random number: A number whose value is not dependent upon the value of any other number: can result from a random number generator program and/or a random numbers table.

Reliability: The consistency of a measure over repeated use. A measure is said to be reliable if repeated measurements produce the same result. s

Reporting: Presentation, formal or informal, of evaluation data, or other information to communicate processes, roles and results (findings).

Response Rate: The percentage of respondents who provide information or answer survey

Self-Evaluation: Self-assessment of program processes and/or outcomes by those conducting or involved in the program.

Stakeholder evaluation: Evaluation in which stakeholders participate in the design, conduct, analysis and/or interpretation of the evaluation.

Statistics: Numbers or values that help describe the characteristics of a selected group; technically, statistics describe the sample of a population.

Statistical Significance: Provides for the probability that a result is not due to chance alone. Level of significance determines degree of certainty or confidence with which we can rule out chance. Statistical significance does not equate to value.

Summative Evaluation: Evaluation conducted after completion of a program (or phase of the program) to determine program effectiveness and worth.

Theory of Change: A comprehensive description and illustration of how and why a desired change is expected to happen in a particular context. It is focused in particular on mapping out or "filling in" what has been described as the "missing middle" between what a program or change initiative does (its activities or interventions) and how these lead to desired goals being achieved. It does this by first identifying the desired long-term goals and then works back from these to identify all the conditions (outcomes) that must be in place (and how these related to one another causally) for the goals to occur.

Utilization Focused Evaluation: A type of evaluation that focuses its design and implementation on use by the intended audience. The evaluator, rather than acting as an independent judge, becomes a facilitator of evaluative decision-making by intended users.

Validity- The extent to which a measure actually captures the concept of interest.
Theory

MICHIGAN OPERA THEATRE
Evaluation Toolkit

Evaluation Readiness Checklist

The following checklist highlights concepts associated with readiness relative to needed resources, evaluation capacity and questions to aid in identifying what aspects of a program will be investigated.

According to The Centre for Innovation in Campus Mental Health (CICMH), undertaking an effective evaluation requires time, effort and resources. This allows you to take stock of resources that are available in order to most appropriately plan for your evaluation work. This initial step is integral in ensuring that your evaluation will yield useful and actionable results.

In planning your evaluation, please be mindful of the following:

- What are your available funds and resources?
- What are your requirements from funders (timing, expectations, reporting schedule etc.)?
- What kind of evaluation are you required to do, if any?
- What kind of evaluation will your budget support?
- Are there any time constraints you are facing relative to other program commitments?

The following checklists should be useful in determining readiness for evaluation and/or evaluability. This checklist has been adapted from the CICMH checklist

1. **Staff/People:** Having the appropriate staff in place to lead the evaluation is a critical factor in determining your readiness to conduct an evaluation.		
Essential Component	Is this in place?	If not in place, this will be addressed by:
1.1 Is there someone who can lead the evaluation work?		
1.2 Does the person who leads this work have time to coordinate what needs to be done or adjust workload in order to do so?		
1.3 Do you have someone who can analyze the data and produce relevant reports or knowledge to disseminate information and develop products coming out of the evaluation?		
Desired Components (nice to have)	Is this in place?	If not in place, this will be addressed by:
1.4 Does the lead person have experience in evaluation work? Or Can they access webinars, tutorials or engage in other learning to get things moving on the evaluation planning?		

1.5 Is there a possibility of hiring an internal or external evaluator?		
1.6 Are there evaluation experts in your network or on your campus that can support your process?		
Quick tip: Is there an evaluation consultant, graduate research and/or evaluation program in your area where you may be able find students and or an evaluator who can support your analysis or data collection.		

2. **Time:** Allocating time for evaluation work in staff work plans and/or team planning allows for preparation and helps mitigate a situation where workloads may become unmanageable.

Essential Component	Is this in place?	If not in place, this will be addressed by:
2.1 Is there a timeline for your evaluation activities?		
2.2 Do the staff have time to complete evaluation activities?		
2.3 Have the expected time commitments for any people supporting your evaluation work been communicated to them?		
Desired Components (nice to have)	Is this in place?	If not in place, this will be addressed by:
2.4 Is there some time at regular staff meetings that can be dedicated to an update of the evaluation work?		
Quick tip: Consider planning your evaluation during the summer months when there may be more available time, or you can utilize students that are out of school, for example in data collection.		

3. **Funds and Other Resources:** Conducting an evaluation will require some allocation of funds and other resources. Preparing for these costs can make your plans concrete and alleviate budget constraints further into the project.

Essential Component	Is this in place?	If not in place, this will be addressed by:
3.1 Is there any internal funding that can be dedicated to evaluation? What amount?		
3.2 Is there any external funding that can be dedicated to evaluation? What amount?		

Desired Components (nice to have)	Is this in place?	If not in place, this will be addressed by:
3.3 Do you have access to any software or data infrastructure that can help you analyze data?		
3.4 Are there in-kind supports that can be accessed?		
Quick Tip: Some evaluation consultants or experts offer their services pro bono for select groups every year; consider researching some experts to potentially access in-kind supports		

4. **Leadership and Supporting Change:** Buy-in from managers, team leaders and funders will ensure evaluation work is given priority and can drive future service improvements.		
Essential Component	Is this in place?	If not in place, this will be addressed by:
4.1 Are the decision-makers or leaders at your organization ready to support you in conducting an evaluation?		
4.2 Is there a practice of learning from your work or continuous improvement strategy based on these learnings within your team/organization?		
4.3 Is there value placed on evidence-based planning by your team's leadership and/or decision-makers?		
Desired Components (nice to have)	Is this in place?	If not in place, this will be addressed by:
4.4 Can decision-makers connect you with potential partners who can support your evaluation work? Are there any volunteer leaders or others that can help you do this??		
4.5 Is there an opportunity to conduct some team learning around evaluation through a staff workshop?		
Quick Tip: This toolkit and many online tutorials discuss evaluation that can be shared with staff. If your organization hosts staff team building sessions, consider dedicating one of these to learning about evaluation work collectively through interactive activities and dialogue.		

Considerations in Establishing Evaluation Questions: Based on Evaluation Questions Checklist for Program Evaluation by Lori Wingate, The Evaluation Center and Daniela Schroeter, School of Public Affairs and Administration, Western Michigan University, 2016

Evaluation questions should be:	Evaluation questions should not be:
Evaluative: Evaluative questions call for an appraisal of a program or aspects of it based on the factual and descriptive information gathered about it. Questions should be framed so they will yield answers that: • Provide determinations of merit, worth or significance, or enable evaluation users to readily reach such determinations on their own. • Directly inform decisions about the program (e.g., how to improve or modify it; whether to continue, discontinue, expand, or reconfigure it).	**Non-Evaluative:** Non-evaluative questions call only for factual information or discrete data points that do not readily translate into determinations of program merit, worth, or significance. Answers to these types of questions have limited potential to influence decisions, because they do not provide a frame of reference in relation to merit, worth or significance.
Pertinent: Pertinent questions are clearly related to the program's substance and evaluation users' information needs. Questions should be directly relevant to: • The program's design, purpose, activities, or outcomes. • The purpose of the evaluation. • What evaluation users need to find out from the evaluation.	**Peripheral:** Peripheral questions are about minor, irrelevant, or superficial aspects of the program or stakeholders' interests. Sometimes these may be helpful in a process evaluation or monitoring capacity but are not pertinent.
Reasonable: Reasonable questions are linked to what a program can practically and realistically achieve or influence. Questions should be suitable with regard to the program's: • Scope (reasonable limits of what or whom the program can influence). • Maturity (the program's stage of development, such as whether it is just starting, fully developed and implemented, or preparing for closure). • Resources (monetary and nonmonetary resources needed to implement and produce outcomes).	**Unreasonable:** Unreasonable questions are about things the program cannot realistically influence given its resources and the nature of intervention.
Specific: Specific questions clearly identify what will be investigated in the evaluation. Questions should point to the following: • Program components that will be examined for the evaluation	**Vague:** Vague questions are stated in overly broad terms, so it is not clear what aspects of a program need to be investigated in order to answer the questions.

• Dimensions of program performance • Those affected by the components or dimensions under investigation	

Answerable: Answerable questions reflect the real-world constraints on the type and quantity of data that can feasibly be collected, analyzed and interpreted. Questions should be answerable based on:
    • Data that can be accessed for the evaluation with due consideration of privacy, ethics, politics, geography and other variables.
    • Resources available to collect, analyze and interpret data, including time, personnel, technology and funding
	Unanswerable: Unanswerable questions cannot be resolved in a definitive way, because it is not feasible to collect enough data or sufficient quality to answer the question in a defensible way.

Complete: When the set of questions thoroughly address the purpose of the evaluation the question set is complete. Question sets should be purposefully selected from a broad range of possible topics (e.g. program design, context, process, implementation, products, outputs, outcomes, impacts, efficiency. Cost-effectiveness, etc.) A set of evaluation questions does not need to address all for these topics, but there should be a sound rationale for the inclusion or exclusion of potential topics.	**Incomplete:** A set of evaluation questions is incomplete when important topics are omitted without a sound rationale that is consistent with the purpose of the evaluation and users' information needs.