Getting Started with Evaluation Quick Guide

First Nations Health Authority
Health through wellness

This guide provides a basic introduction to evaluation, including key concepts and considerations for planning and conducting evaluations while highlighting actions and resources to support the process.

Evaluation Defined

Evaluation is a structured way of looking at what was done, what changed, and what difference a program, service or initiative is making over time. It helps tell the story of progress, celebrate successes, identify opportunities for improvement, and inform decision-making[1]. Evaluation can support First Nations self-determination by informing planning, advocacy, and future priorities.

Evaluation differs from the following:

- **RESEARCH.**
  Generates new knowledge or theory, while evaluation looks at how well a program, service, or initiative is working.
- **PERFORMANCE MEASUREMENT.**
  Tracks progress on an ongoing basis, while evaluation takes a deeper look at a specific time period.
- **AUDITS.**
  Checks whether requirements, policies, or standards are being followed, while evaluation helps us understand what is working, what is not, and why.

When to Evaluate

An evaluation may be helpful if you answer "yes" to any of the questions below:

- ☑ Is evaluation required as part of a funding agreement or reporting requirement?
- ☑ Are you starting a new program, service, or initiative and want to examine its progress?
- ☑ Are you making changes to an existing program, service or initiative and want to understand whether those changes are making a difference?
- ☑ Are communities, partners, or funders asking for information about outcomes or successes of a program, service or initiative?
- ☑ Do you need evidence to support planning, decision-making, or resource allocation?

Culturally Safe Evaluation

Culturally safe evaluation recognizes that values, beliefs and different ways of knowing and being shape how we understand success, progress and change. It involves designing and conducting evaluations in ways that respect and reflect the cultures, priorities, and contexts of the people and communities involved[2].

There are many ways to conduct evaluations grounded in cultural safety and humility. The Anti-Racism, Cultural Safety & Humility Framework can help inform and guide your approach[3]. Additional tips and resources are provided in this quick guide.

1. https://evaluationcanada.ca/career/what-is-evaluation.html
2. https://nasaa-arts.org/wp-content/uploads/2017/11/CRE-Reading-1-Culturally-Responsive-Evaluation.pdf
3. https://fnha.ca/wp-content/uploads/migrated/Documents/FNHA-FN-HC-FNHDA-Anti-Racism-Cultural-Safety-and-Humility-Framework.pdf

While evaluations may vary in purpose, scope, and methods, they generally follow the same steps: Scoping, Planning, Knowledge Gathering, Analyzing, and Sharing. The following pages provide an overview of each step, the associated actions to undertake and resources to support the process.

1. Scoping: Clarify evaluation goals

Scoping helps define what you want to learn, how the evaluation will be conducted, and how the findings will be used.

ACTION: Work with key partners to identify the key questions, priorities, and information needs that will guide the evaluation.

RESOURCE: Use the **Evaluation Scoping Guide** to guide discussions.

2. Planning: Plan and define the evaluation

Planning involves deciding what information is needed and how it will be collected to meet your learning needs. The evaluation type you choose depends on what you want to learn and the questions you want to answer. Evaluations can be conducted during the early stages of implementation to support improvements or later to assess outcomes and results.

EVALUATION TYPE	EXAMPLE QUESTIONS
Implementation evaluations examine whether a program, service, or initiative is being delivered as intended and identify opportunities for improvement.	■ Was the program delivered as intended? ■ What is working well? ■ What improvements could strengthen the program?
Outcome evaluations assess whether a program, service, or initiative is achieving its intended outcomes and making a difference.	■ To what extent were the intended outcomes achieved? ■ What changes resulted from the program?

ACTION: Develop an evaluation plan that builds on the information needs identified during scoping. Include your evaluation questions, data collection methods, roles and timelines, and how findings will be used. Align the plan with First Nations data sovereignty principles, including OCAP® and community- or Nation-specific Protocols[4].

RESOURCES: Use the **Evaluation Framework Template** to create an evaluation plan.

4. https://fnigc.ca/ocap-training/

3. Knowledge Gathering: Collect data

Knowledge gathering involves collecting the information needed to answer your evaluation questions. The methods you use will depend on the information needed, available resources, and the people involved. Consider methods that are respectful, trauma-informed, strengths-based, reflective of community priorities, and grounded in cultural safety and humility.

EVALUATION TYPE	EXAMPLE QUESTIONS
Survey	Participant feedback, satisfaction, and changes in knowledge or understanding
Interviews, focus groups or sharing circles	Experiences, perspectives, stories and suggestions for improvement
Document and data review	Program records, reports, meeting notes, and budgets
Observations	Real time documentation of program activities, service delivery, and interactions
Arts-based methods	Experiences expressed through drawing, mapping, photos or other creative approaches.

ACTION: Collect the information needed to answer your evaluation questions using the methods identified in your evaluation plan. Where possible, use existing data to minimize participant burden. Align knowledge gathering with First Nations data sovereignty, including OCAP® and community- or Nation-specific Protocols.

RESOURCES: Use the **Evaluation Framework Template** to guide and document your knowledge gathering.

4. Analyzing: Make meaning of knowledge gathered

Analyzing involves reviewing and interpreting information collected from different sources to identify key findings, understand what they mean, and answer the evaluation questions.

ACTION: Review and interpret the findings from the information collected to make sense of the results and identify key insights. Confirm findings with communities, participants, and other key partners.

RESOURCE: Use resources linked within the **Evaluation Framework Template** to support analysis.

5. Sharing: Communicate findings

Sharing findings involves communicating results and lessons learned through different evaluation products that support decision-making, learning, and improvement. Consider how findings will be returned to the intended knowledge users and shared back with those who contributed to the evaluation.

EXAMPLES OF EVALUATION PRODUCTS

- Final Report
- Interim Report
- Executive Summary
- Presentation
- Data Summary
- Briefing note
- Infographic
- Fact sheet
- Case study
- Video
- Webpage
- Dashboard
- Meetings
- Discussions
- Sharing Circles
- Podcast

ACTION: Develop evaluation products that share findings and return results to intended knowledge users through approaches that are accessible, meaningful and grounded in cultural safety and humility.

RESOURCES: Use the **Evaluation Report Template** if you are developing an evaluation report.

Resource Summary

Many resources exist to help you plan, conduct, and use evaluations effectively. For a full list of available templates, guides, and other resources, see Appendix A of the Evaluation Framework Template.

The resources referenced in this guide and are available for download include:

- **Evaluation Scoping Guide (Step 1):** Helps define what you want to learn, why the evaluation is being done, who should be involved, and what information is needed.
- **Evaluation Framework Template (Steps 2, 3, 4):** Helps design and plan the evaluation by defining its purpose, key questions, methods, and approach. Additional resources are included in Appendix A.
- **Evaluation Report Template (Step 5):** Helps summarize, communicate, and share evaluation findings with intended knowledge users.

Read more about evaluation at FNHA here by scanning the QR code or visiting this link:
fnha.ca/about/governance-and-accountability/audits-and-evaluations/

If you have questions please contact the FNHA Evaluation Team at evaluation@fnha.ca