

# Evaluation Challenges and Solutions

Common Problems in Community-based Evaluation and Strategies for Solving Them

Developed by Research Power Inc.



# Introduction

This guide is based on information collected during delivery of the course [Evaluation Training for Physical Activity Practitioners](#). The course was a virtual training in evaluation for people working in the physical activity sector (in areas such as sport, recreation, health promotion) across Canada. It was developed and delivered in 2021 and 2022 by Clare Levin, [Research Power Inc.](#) Partner, on behalf of the [Canadian Fitness and Lifestyle Research Institute](#) (CFLRI) with funding from the Government of Canada. Among many other evaluation topics, the course covered potential challenges in evaluation, and how these challenges could be prevented or resolved if they occur. Course participants identified possible challenges and then worked together to brainstorm solutions. The results of these discussions have been compiled into this guide to challenges and solutions in evaluation.

## Evaluation Challenges and Solutions

### The Challenge: Evaluations that are Poorly Planned

Evaluation activities may not be well planned at the beginning of a project, leading to last minute scrambling to get the work done and challenges with data quality.

#### *Ideas for Prevention*

- Be proactive. Make sure to consider evaluation needs at the beginning of a project and build in required resources and capacity over the course of the project/evaluation.
- Develop a logic model or theory of change for your program/initiative and use this to guide evaluation activities and plans.
- Build an evaluation plan that is realistic and achievable given available resources. Build flexibility into your plan so that you can adapt it as needed if circumstances change.
- Get leadership buy-in and support for the evaluation and the time and resources that will be required.
- Keep evaluation activities simple and focused to assist with planning.
- Build in meetings/check-ins at regular times to make sure planning and implementation is on track (e.g., monthly, quarterly, or annually depending on evaluation scope and needs).
- Link the evaluation to other organizational priorities and needs. Consider how the evaluation results will help the organization make decisions and improve.
- Have a clear process and accountabilities for decision-making about the evaluation.

### *Ideas for Addressing the Problem if it Happens*

- It's never too late to develop a plan. Start planning when you can, even if it's not at the beginning of the evaluation.
- Engage someone with expertise in evaluation to help you refine your evaluation plan.
- Revisit the evaluation priorities and adapt evaluation activities if needed.
- If you are missing baseline data due to poor planning, a style of question called a pre-post retrospective can help you gather data from participants reflecting the beginning of a project.

### **The Challenge: Lack of Financial Resources**

Conducting an evaluation can be costly, and it can be difficult for organizations to find the financial resources to support an evaluation.

### *Ideas for Prevention*

- Build enough resources into the program budget to support evaluation activities. A good rule of thumb is to allocate 10-15% of your budget for evaluation, but keep in mind that this percentage will vary depending on the expectations and requirements for the evaluation.
- Find other ways to fund evaluation activities (e.g., other funders, sponsors).
- Work with your organization's leadership to promote the importance of learning, evaluation, and quality improvement. This can help to build support for resources for evaluation activities.

### *Ideas for Addressing the Problem if it Happens*

- Be honest and realistic with your stakeholders and the commissioners of the evaluation (those that asked for the evaluation) about what can be accomplished with the available resources.
- Adapt your evaluation plan to the resources you have. This may mean collecting less data or not being able to address every evaluation question or evaluate every part of the program. Ask stakeholders to help you prioritize.
- Be creative with your data collection plans and choose less expensive options to reduce costs.
- Use existing resources as much as possible (e.g., existing staff) so that new money is not required.
- Partner with other stakeholders who might be able to provide for some evaluation needs (e.g., space, facilitator, help with analysis).

## The Challenge: Lack of Staff Time/Capacity

Evaluation activities can be time-consuming. Organizations may run into situations where staff do not have the capacity to conduct the evaluation that has been planned.

### *Ideas for Prevention*

- When you plan your evaluation, think about what will be required in terms of staff time to support evaluation activities. Plan for this time well in advance and incorporate it into staff work plans. Identify any potential gaps or times when staff capacity might be limited and develop a proactive plan to address those.
- Build an evaluation team so that all the work does not fall to one person, and the team can adapt if there are staffing changes along the way.
- Seek additional funding to hire staff or consultants to support the evaluation activities.
- Plan the timing of evaluation activities strategically (e.g., times that are less busy for staff).

### *Ideas for Addressing the Problem if it Happens*

- Engage volunteers or interns to help support evaluation activities.
- Engage a paid evaluation consultant.
- Prioritize and scale down evaluation activities. Just like in the case of [limited financial resources](#), you need to adapt the evaluation plan to the human resources you have available.
- Reuse tools/processes (if appropriate) from previous evaluations to save time.

## The Challenge: Lack of Expertise in Evaluation

Planning and implementing an evaluation requires specialized knowledge and skills. Not everyone has knowledge/experience in evaluation.

### *Ideas for Prevention*

- Support staff in developing their skill in evaluation (e.g., participating in external training, conducting internal workshops).
- Bring in an expert to provide advice and support to staff throughout the evaluation process. This helps provide expertise for the current evaluation and also builds staff skills to conduct evaluations in the future.
- Try to find other similar projects that have been evaluated and pull lessons learned and data collection tools (if appropriate) from those sources.

### *Ideas for Addressing the Problem if it Happens*

- Identify students or others who have evaluation expertise and might want to volunteer to support your evaluation.
- Engage a paid evaluation consultant.
- Use programs that can help with data analysis (e.g., survey software that will prepare reports and charts automatically).

### **The Challenge: Low Response Rates**

It can be challenging to find enough participants or respondents to provide data in your evaluation. This can be a concern particularly when using surveys which tend to have a lower response rate.

### *Ideas for Prevention*

- Build authentic relationships with the communities you want to hear from. Engage them in the evaluation planning process to build buy-in for their participation. Ask individuals and groups how they would prefer to be involved in the evaluation.
- Get input from evaluation participants in developing your evaluation data collection tools (e.g., using an advisory group or pilot testing tools) to ensure they will be appropriate and meaningful for respondents.
- Think about how you are asking/inviting people to participate. A direct invitation from someone the individual knows can be more effective than a form email or poster.
- Promote the opportunity to participate using multiple channels (social media, online, in person, traditional media, etc.).
- Make the data collection process convenient. For example, hand out data collection tools at an event and collect them at the end for an improved response, or have people complete it while they are waiting for something else. Take the data collection process to the participants.
- Tell participants why their input matters and how it will be used.
- Offer a variety of ways to participate. For example, offer both surveys and focus groups; offer online and in person options.
- Do something different with your data collection tools – instead of a standard survey, try a new approach (e.g., photo voice, story sharing)
- Think about and address the needs of participants. For example, for in person data collection, you may need to provide assistance with transportation or childcare. For virtual data collection consider technology barriers and needs.
- Provide incentives to encourage people to participate (e.g., refreshments for in person activities, honorariums, gift cards, draw prizes).
- Coordinate data collection with other parts of your organization. Make sure that participants are not being asked to provide input into many different things at one time, or develop one data collection tool that can meet different organizational needs at the same time.
- Plan timelines to allow enough time for additional recruitment if necessary.

### *Ideas for Addressing the Problem if it Happens*

- Monitor your participation/response rate during the participant recruitment and data collection process. Flag low response rates and implement interventions to improve response (e.g., fun and engaging reminders, identifying and addressing barriers, adding incentives).
- If you have time and resources to do so, consider adding an alternate data collection method to gather more feedback.
- Find a champion (someone that has participated in the data collection) and ask them to help you promote it to their contacts.
- If you do have a low response rate, acknowledge the limitations of the data in your reporting.

### **The Challenge: Poor Data Quality**

Your evaluation can be negatively affected by poor quality data. Data quality problems can result from low response rates in data collection, missing data, poor design of data collection tools, or other issues.

### *Ideas for Prevention*

- Build the data collection tools for your evaluation based on a clear evaluation framework so you know what information you need to gather, from who, and how you are going to use this data to answer your evaluation questions.
- Design your evaluation with a mix of methods that support triangulation of data (i.e., more than one data source evaluating a particular question or indicator). This will give you options for presenting the data if one data source is of poor quality.
- Think through to analysis and reporting when planning data collection so you can be sure your data is going to help you address all the areas where you need to report.
- Be clear about accountabilities and timelines for data entry/collection.
- If you don't have experience developing data collection tools, get input from someone with knowledge in this area to ensure that data collection tools are well-designed.
- Look at other existing data collection tools for examples of question design (e.g., surveys from other reputable organizations).
- Pilot test your data collection tools and adapt them based on feedback. Get input from evaluation participants on the data collection tools to make sure they meet the needs of participants.
- Don't wait until the end of the evaluation process to review the data. Check in regularly as data is being collected to see how it's going and identify and address any gaps or challenges.
- Check out the other ideas for addressing [low response rates](#) as a potential source of poor data quality.

### *Ideas for Addressing the Problem if it Happens*

- If you have to exclude data because it is poor quality, see if you can find an alternate data source to use instead.
- Acknowledge any challenges with data quality in your reporting. You may need to work with stakeholders to adjust expectations for how the data can be used.
- Learn from your experience and think about what you can do differently next time to get better quality data.

## **The Challenge: Maintaining Confidentiality of Evaluation Data**

Evaluations are often collecting sensitive and/or confidential information. Having the right processes, approaches, and safeguards in place to maintain confidentiality can be challenging. Participants in evaluations may also have concerns and questions about the confidentiality of their data.

### *Ideas for Prevention*

- Establish organizational policies around confidentiality and privacy of data collected through evaluations.
- Educate staff about the importance of confidentiality and relevant privacy legislation and practices.
- Clearly explain to evaluation participants why you're collecting their information, how the information will be used, who will have access to it, and how data will be stored and protected.
- Develop and implement a plan for gathering, storing, and destroying evaluation data in an appropriate and confidential manner.
- Use reputable companies for data collection (e.g., consultants, survey software providers) that understand confidentiality and privacy and have appropriate policies and processes in place.

### *Ideas for Addressing the Problem if it Happens*

- If a breach of privacy occurs, be transparent about what happened and what data was accessed. Identify lessons learned that can help to improve your practices in the future.

## **The Challenge: Using Evaluation Results**

Evaluation results may not be well-communicated, and they may end up not being used. Evaluation findings may not meet the needs of stakeholders that want to use the information to support decision-making.

### *Ideas for Prevention*

- Involve those who will be using the evaluation results (from senior decision-makers to program staff and participants) in the evaluation planning process.

- Plan your evaluation with attention to how you will use the evaluation findings (i.e., identify relevant/helpful evaluation questions).
- Check in with senior leaders and other evaluation users regularly to share preliminary findings in an ongoing way rather than waiting until all the data is ready to present to share information.
- Organize evaluation data/results to “answer” evaluation questions and/or to explain progress on specific outputs and outcomes of the work.
- Think about your audiences (i.e., the evaluation users) and how they prefer to receive and use information. Tailor your evaluation findings to the needs of each audience. This may mean having different reporting and communication tools for different audiences.
- Use/apply knowledge translation best practices when sharing information and think outside the box with communication and engagement strategies.
- Connect evaluation findings to other organizational strategies and priorities.
- Ensure that your data is strong and evaluation results and findings are well-supported.
- Work with your organization to build a culture of learning to promote interest in and use of evaluation. Share and promote the benefits of learning and evaluation more broadly (not just linked to one specific evaluation). If you are in a leadership role, support your staff to learn about evaluation.

#### *Ideas for Addressing the Problem if it Happens*

- Repeat evaluation findings/messages more than once. Come back to users after sharing findings to further discuss what they mean and how they can be used.
- Ask users how you can make the evaluation results more meaningful or applicable for them, and then follow through on what they suggest.
- If findings are not used as intended, reflect on why (and ask your stakeholders), then implement changes in the next evaluation.

**Good luck with your evaluation!**