DATA AND INFORMATION VISUALIZATION

THROUGHOUT THE EVALUATION LIFE CYCLE

FOR PARTICIPATORY EVALUATION AND

EVALUATION CAPACITY BUILDING

American Evaluation Association: Evaluation 2011

Thursday, November 3, 2011, 10:45 – 11:30 am

innovation network

TRANSFORMING EVALUATION FOR SOCIAL CHANGE

![innovation network — TRANSFORMING EVALUATION FOR SOCIAL CHANGE]

- Mission: building evaluation capacity

- Evaluation and strategy consulting

- Social sector: philanthropic and nonprofit

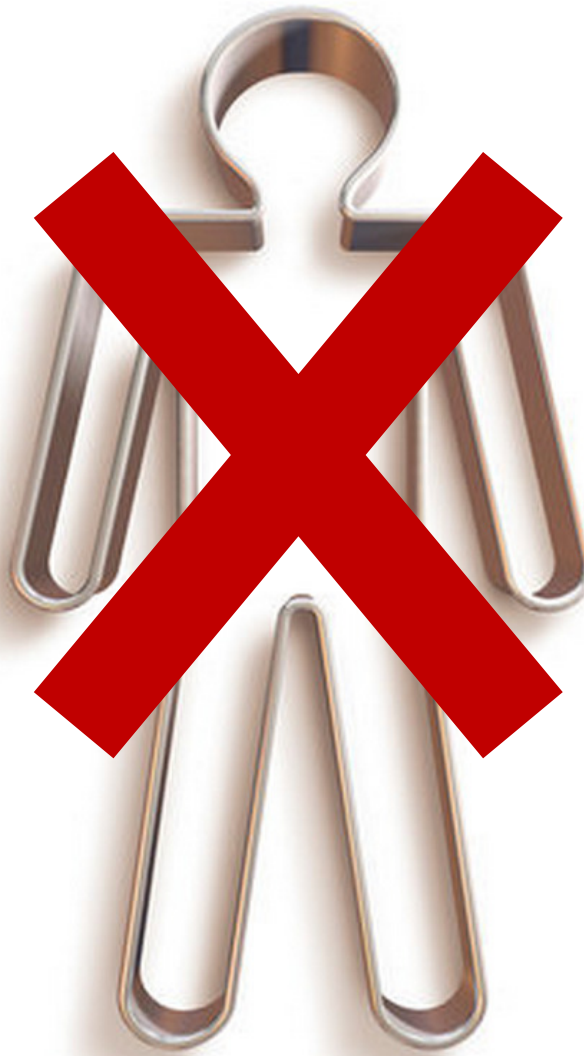## Johanna Morariu & Veena Pankaj

Johanna

Veena

- Co-Directors @ Innovation Network

- Wide range of evaluation experience

- We use data/info viz to improve evaluation

...why?

We learn differently.

visual   auditory   physical

Human brains are wired to speak and understand spoken language.

People have to be taught to write and read.

Understanding the written word is not a natural human ability; but human brains do innately process shapes.

For a great discussion of these—and related—topics, we recommend *Designing with the Mind in Mind* (2010) by Jeff Johnson—especially chapter four, *Reading is Unnatural*.
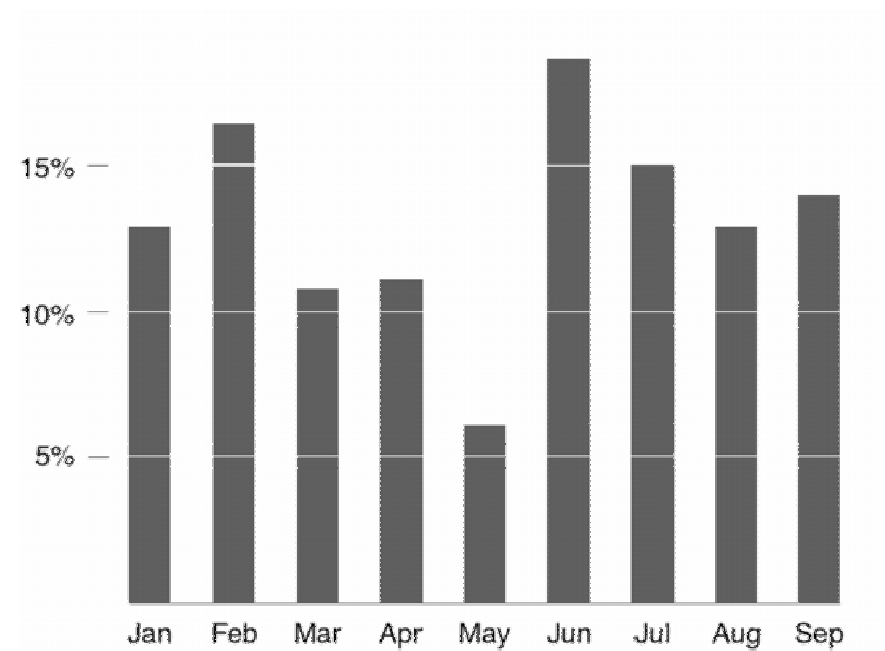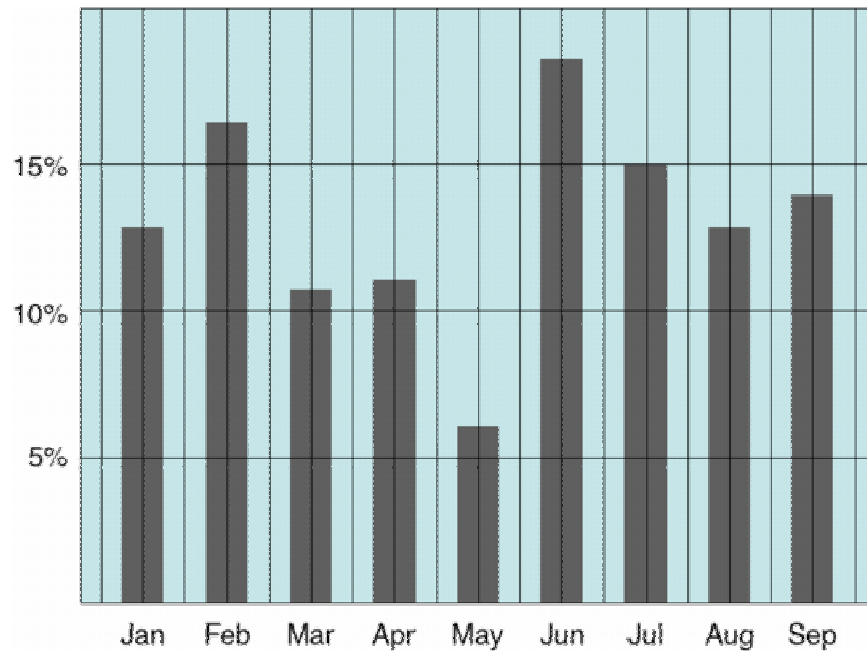
6

Evaluation + Data/InfoViz = ↑Participation & ↑ Capacity

DESIGN PRINCIPLES

1) Maximize data:ink

2) Make color and contrast work for you

3) Allow the purpose to select the medium

4) Avoid using codes/legends

5) Classic graphic design principles: balance, rhythm, proportion, dominance, & unity

DESIGN PRINCIPLES

1) Maximize data:ink

Example taken from Data-Ink Ratio, Infovis Wiki,
http://www.infovis-wiki.net/index.php/Data-Ink_Ratio

DESIGN PRINCIPLES

2) Make color and contrast work for you

- Emphasis
- Clarity
- Unity
- Flow

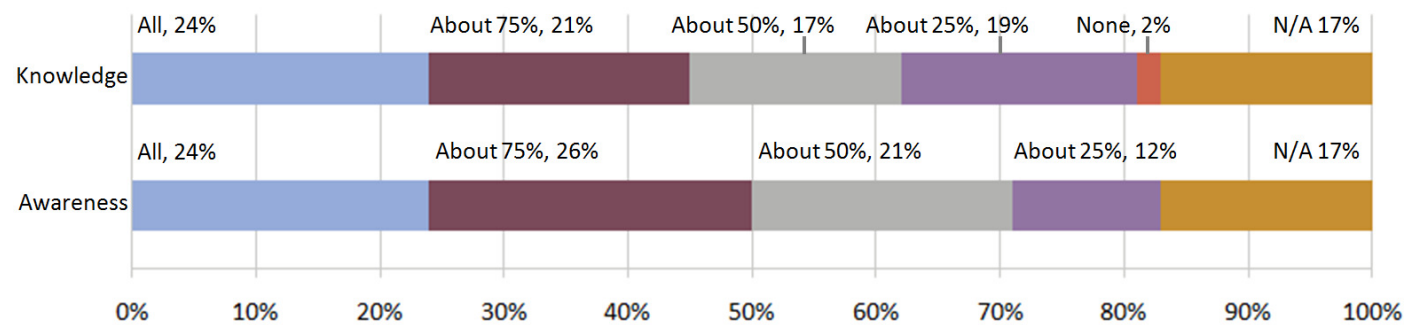{ olive } hues

seeds

Color scheme courtesy of
www.design-seeds.com

client colors

color scheme
www.design-seeds.com

seeds

translation into
design element

Figure 9: Awareness and Knowledge Changes Seen by Participants (n = 42)

	All, 24%	About 75%, 21%	About 50%, 17%	About 25%, 19%	None, 2%	N/A 17%
Knowledge						

	All, 24%	About 75%, 26%	About 50%, 21%	About 25%, 12%		N/A 17%
Awareness						

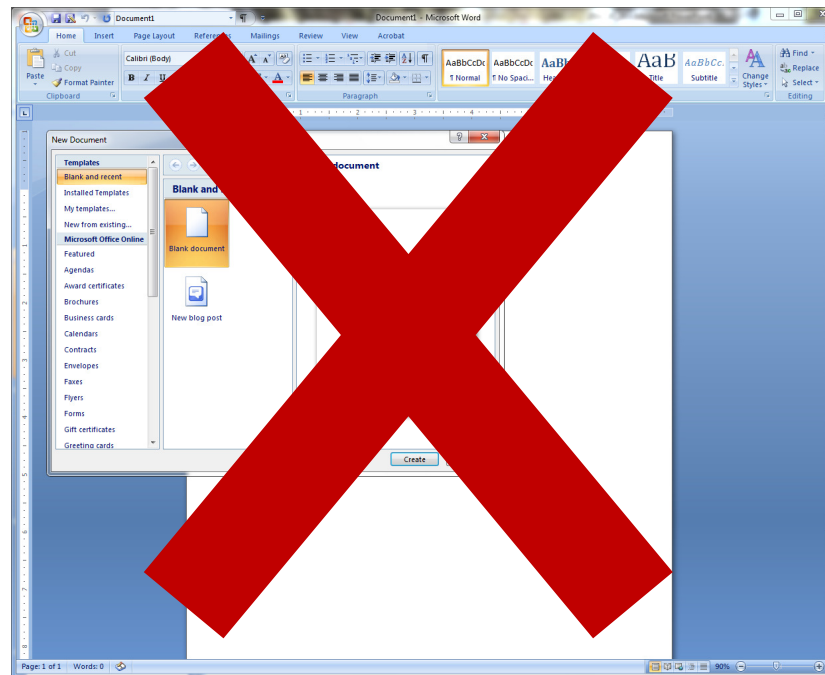0%   10%   20%   30%   40%   50%   60%   70%   80%   90%   100%

bridal
{ pinks }

autumn
{ rays }

Color scheme courtesy of
www.design-seeds.com

DESIGN PRINCIPLES

3) Allow the purpose to select the medium

DESIGN PRINCIPLES

4) Avoid using codes/legends

World Gross Domestic Product (GDP) by Region Expressed in Purchasing Power Parity, Reference Case, 1990-2030

Legend:
- United States
- Canada
- Mexico
- OECD Europe
- Japan
- South Korea
- Australia/New Zealand
- Russia
- Other (Non-OECD Europe and Eurasia, ex Russia)
- China
- India
- Non-OECD Asia (ex India, China)
- Middle East
- Africa
- Brazil
- Central and South America (ex Brazil)

mongabay.com using EIA 2009 data

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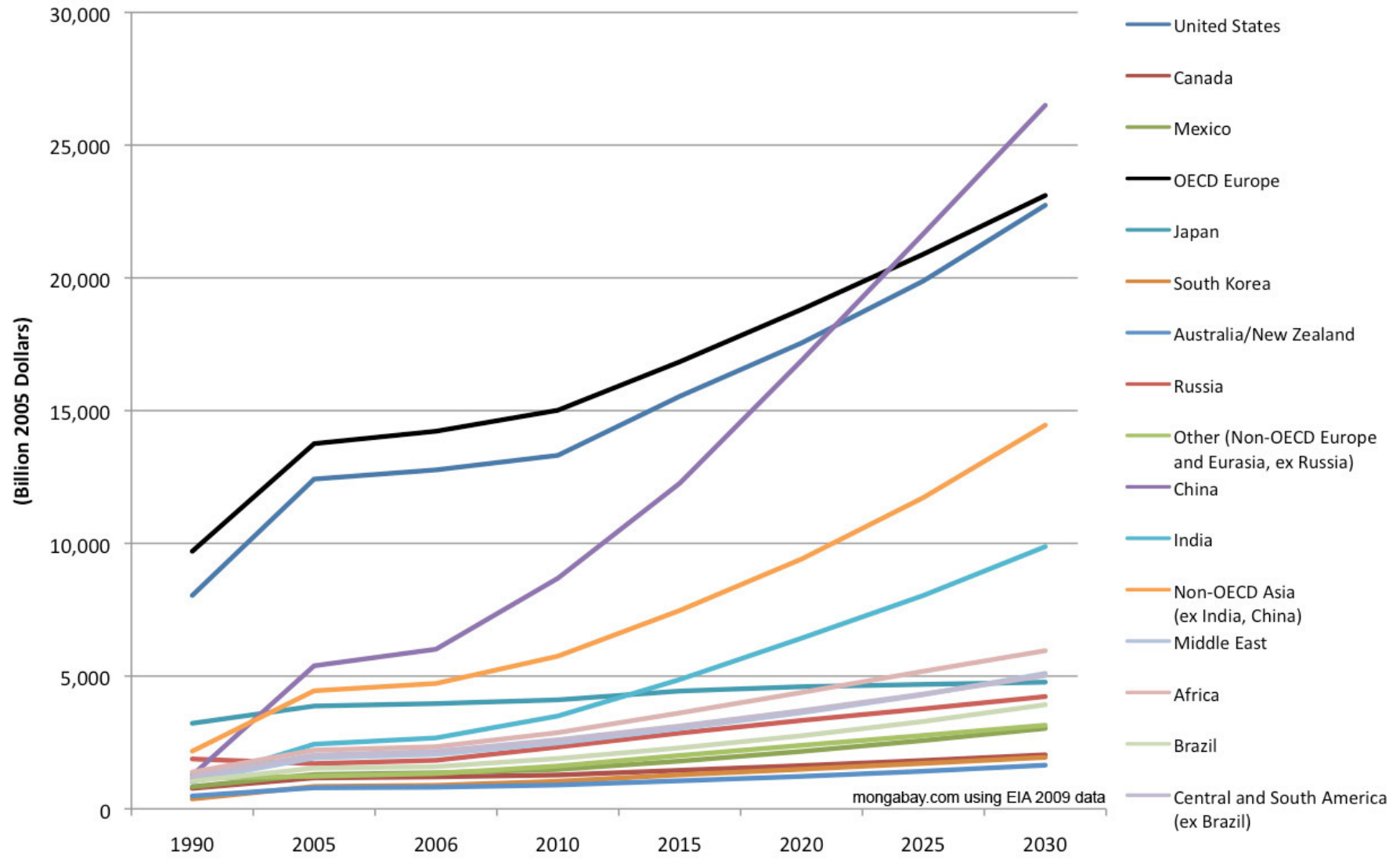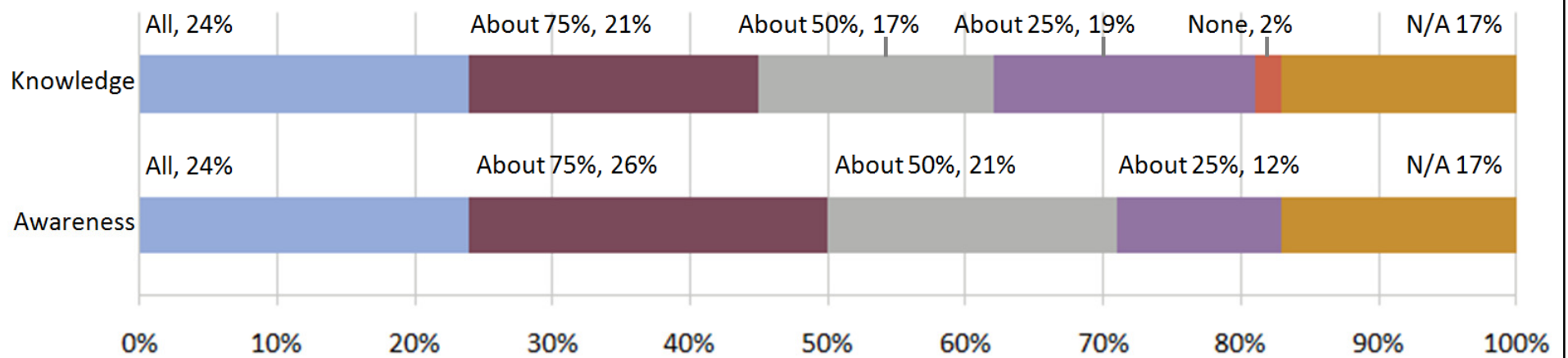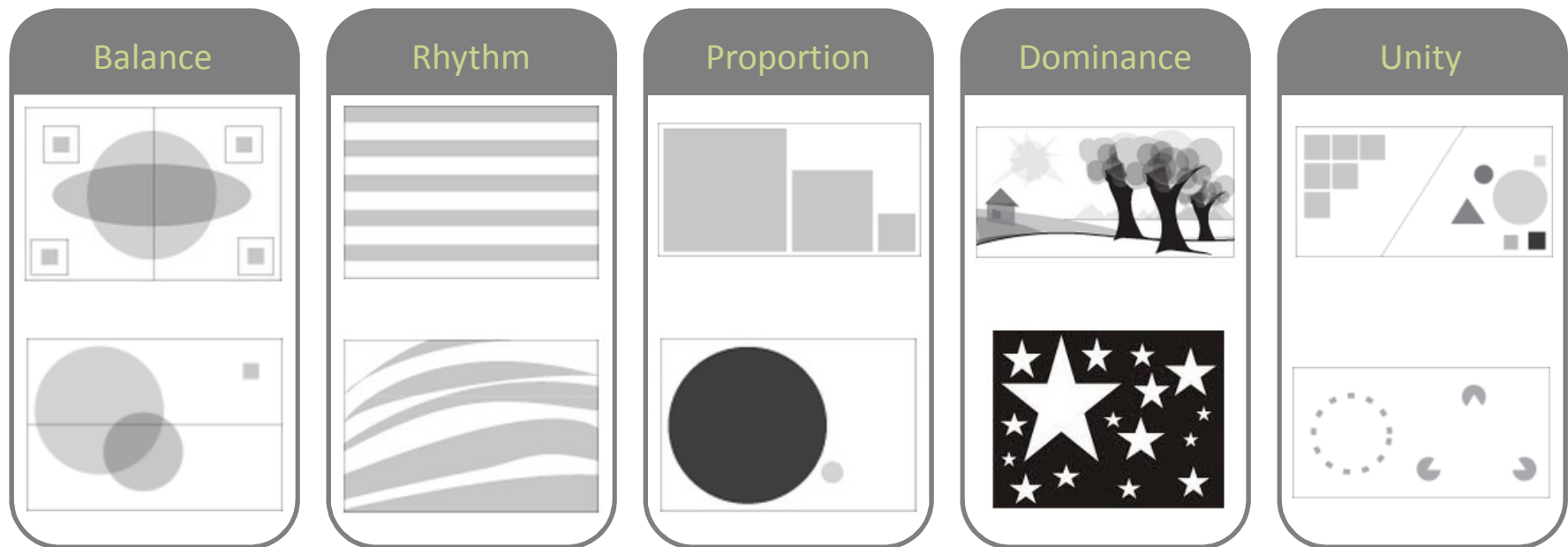*Figure 9: Awareness and Knowledge Changes Seen by Participants (n = 42)*

DESIGN PRINCIPLES

5) Classic graphic design principles

| Balance | Rhythm | Proportion | Dominance | Unity |

For a great discussion of these principles we recommend the *The Principles of Design* by Joshua David McClurg-Genevese, available at http://www.digital-web.com/articles/principles_of_design/

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DESIGN PRINCIPLES

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Agenda = Evaluation Cycle

I.   Planning

II. Data Collection

III. Analysis & Reflection

IV. Action & Improvement

Problem Statement

Many low-income women in Harrison County lack the confidence and know-how to obtain employment and be self-sufficient.

Goal

Participating women achieve economic self-sufficiency through training, placement, and support

Long-Term Outcomes

Participants move into higher-paying jobs

Rationales

Achievement of economic self-sufficiency is closely related to opportunities for training and education

Assumptions

There are living wage jobs available near this neighborhood, with public transportation to reach those jobs

Resources

| Teachers |
| Job counselors |
| Training space |
| Meeting space |
| Computer systems |
| Grant funds |
| Office supplies |

Activity Groups

| Develop curriculum |
| Select participants |
| Coordinate logistics |
| Deliver trainings |
| Training |
| Follow up with participants |

Outputs

1 new curriculum

120 client assessments completed

16 trainings held
78 participants complete trainings

Revised curriculum series
120 client assessments completed
16 trainings held
78 participants complete trainings

Intermediate-Term Outcomes

Participants obtain full-time paid employment

Short-Term Outcomes

Participants improve job skills

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Post Carbon Institute: Theory of Change

Mission: To provide individuals, communities, businesses, and governments with the resources needed to understand and respond to the interrelated economic, energy, and environmental crises that define the 21st century. We envision a world of resilient communities and re-localized economies that thrive within ecological bounds.

INFLUENCE AUDIENCES

–Nonprofit Organizations and Funders
–Individuals and Communities
–Local, State, and Federal Governments
–Academics and Prominent Voices in Related Fields

IMPACT

Resilient communities and re-localized economies thrive within ecological bounds

STRATEGIES

Analysis and Synthesis
Create high quality research products that connect the dots between economic, energy, environmental, and (in)equality issues

Fellows
Link fellows and their networks. Integrate, share, and amplify fellows' work and ideas. Learn from and draw on fellows' expertise to inform PCI's work

Relationship and Partnership-building
Build and sustain relationships with influencers and decisionmakers—in federal, state, and local government, in business, in the media, and among nonprofit and funding organizations

Communications
Effectively communicate with audiences to promote spread and uptake of messages

Link to Actionable Information
Link to practical, actionable information from like-minded peers

Credibility and Visibility
Strengthen and grow organization and fellows' credibility and visibility

Organizational Strength and Capacity
Grow and prepare PCI so that the organization can continue to operate through the systemic shocks resulting from economic, energy, environmental, and (in)equality crises of the 21st century

DESIRED SHIFTS

Practice and Policy Change

Discourse Change

Individual and Public Will Change

Focusing Events, Crises, and Windows of Opportunity

–Direct attention to economic, energy, environmental, and (in)equality issues
–Create awareness and interest in the solutions offered by PCI
–Contribute to individual and public demand for change

PHILANTHROPIC INITIATIVE: LONG-TERM STRATEGY

	YEARS 1 – 3: QUALITY & SHARED OWNERSHIP			YEARS 4 - 6: FIELD-BUILDING		LONGER TERM OUTCOMES
EVIDENCE	Randomized SIF evaluation begins	Random Assignment evaluation in place (1 -3 sites) and specialized studies begin	Initial evaluation findings from multiple studies	Midterm evaluation results	Share evaluation findings / Evaluation findings inform practice	Multiple evaluations have informed practice and policy
FUNDING	Aligned funding in target states	Funding commitment from additional national funders		Increased state funding in targeted states	Gain funding support from federal funders	Funding mix: - 80 – 90% state & fed - 10 – 20% philanthropic
SCALE		Tipping points for platforms and states defined	State policy change work underway and making progress	State policies changed to support integrated strategies	Robust field of implementing organizations with standards and high concentration in key states	Tipping point achieved by states
OWNERSHIP	Leadership group formalized/Intermediaries identify common strategies for funding	Leadership group moves forward on state strategy	Common outcomes identified/ explore creation of standards	Quality improvement from standards assessments	Second generation leaders in place	Tipping points achieved across platforms in targeted states
PLATFORMS	Cross-network learning and technical assistance needs identified	Foundations support joint proposal intermediary proposal	Organizations report to funders using common outcomes	New strategic friends emerge	New platforms, e.g. Early childhood, schools, employers ?	Tipping points achieved by platform

Drawing provided courtesy of Colin Austin, caustin@mdcinc.org. Used with permission.

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Philanthropy's Albatross: Debunking TOCs

What is a TOC?
- Various definitions
  - Grantcraft
    - Lookup definition In guide
  - Defines the building blocks
  - Paul Brest's
    - Empirical basis underlying Any social intervention
      - For me my empirical Basis is the world (Albert Ruesga)
  - Products
- Confused with logic model
- How about the experts' definition/ as in academic papers
  - Don't use the term TOC
    - = sequence of causes and effect If A -> B -> C -> OUTCOMES
  - Use program theory instead

Problem
- It's a prognostication/ Fortune Telling

Toc's Uses
- Plan programs
- Evaluate
- Enrich consultants
- Befuddling grantees

Based on article
- Inspired by Paul Brest's article on power of TOC
  - We should require them
  - Challnged skeptics

Recommendation
- Plausibility test
- Don't request TOC. Ask questions instead
- Ask to keep it simple
- What will it buy me more than the proposal?

Examples
- Parks, Inc.
  - 1. They submitted a Proposal
  - 2. We asked for TOC
  - 3. They got the grant
  - But they didn't get the outcomes
    - Why?
      - Formulated new assumption Changed TOC
  - Lessons Learned
    - Relevant parts of your TOC were already in the proposal
    - Then, life happened
    - Articulating all the conditions would be impossible
    - Your TOC
      - Not helping
        - Plan your work
        - Evaluating your work
    - You work for your toc
- Resident on mgmt board
  - Lessons Learned
    - Complicated yet Does not even begin articulating
    - If situation does not improve Does not tell you an alternative

For more information about Eva's work and Net-Map visit http://netmap.wordpress.com/

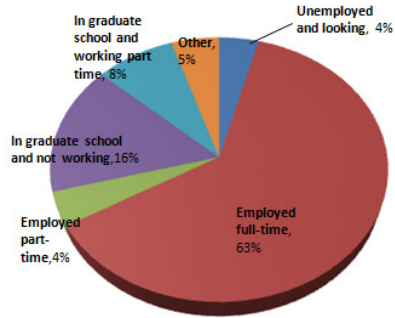Agenda = Evaluation Cycle

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III. **Analysis & Reflection**
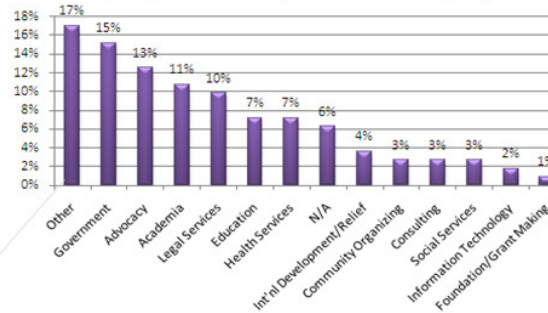
IV. Action & Improvement

II. Career At-a-Glance

**1** What is your current employment status? (n=120)

- Unemployed and looking, 4%
- Other, 5%
- In graduate school and working part time, 8%
- In graduate school and not working, 16%
- Employed part-time, 4%
- Employed full-time, 63%

2 Please select an industry that best describes your current line of work? (n=112)

- Other 17%
- Government 15%
- Advocacy 13%
- Academia 11%
- Legal Services 10%
- Education 7%
- Health Services 7%
- N/A 6%
- Int'nl Development/Relief 4%
- Community Organizing 3%
- Consulting 3%
- Social Services 3%
- Information Technology 2%
- Foundation/Grant Making 1%

Includes:
Journalism
Leadership development
Non-profit finance/lending
Program Development
Public Policy

Social Change/Popular Education
Affordable Housing/Housing Rehab
Agriculture
Alternative health
International social entrepreneurship
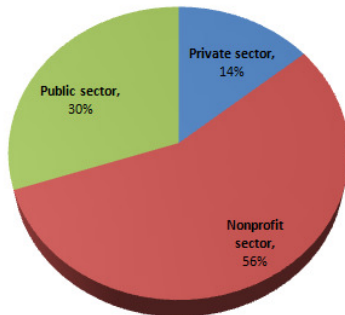Education and Outreach

3 At what level is the majority of your organization's work? (n=112)

- State, 10%
- Local, 21%
- Other, 17%
- N/A, 18%
- National, 34%
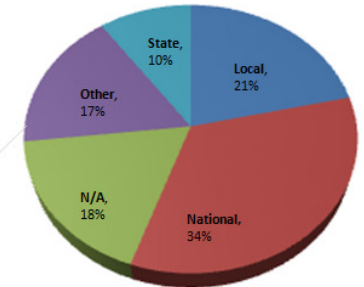
Includes:
International (7)
College librarian
Local work across the nation
Federal District Court
Regional

4 In what sector are you currently working? (n=93)

- Private sector, 14%
- Public sector, 30%
- Nonprofit sector, 56%

5 To what extent does this position deal with hunger, poverty, racial justice and/or other related social justice issues? (n=112)

A great deal — Somewhat — Small amount — Not at all — N/A

	A great deal	Somewhat	Small amount	Not at all	N/A
Other social justice issue (n=107)	53%	22%	10%	7%	7%
Racial justice (n=107)	31%	25%	22%	15%	7%
Poverty (n=107)	52%	21%	15%	6%	7%
Hunger (n=109)	27%	18%	29%	19%	6%
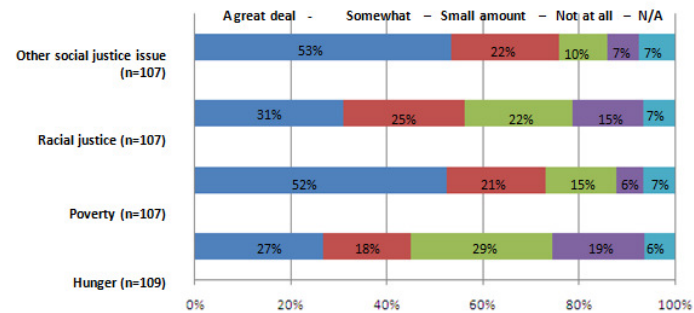
6 If you were asked to choose the area in which you spend most of your time at work, what would it be? (n=109)

- Organizing, 4%
- Advocacy programs/Campaigns, 14%
- Direct service, 15%
- Other, 26%
- Research/ Evaluation/ Program development, 41%

Other includes: legal work, government/contractual analysis, political strategy, tax analysis, administrative work, marketing, etc.

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U.S. Papers

Week ending:	7/13/2008	7/20/2008	7/27/2008	8/3/2008	8/10/2008	8/17/2008	8/24/2008	8/31/2008	9/7/2008
Term 1	41	54	30	36	22	14	24	18	30
Term 2	36	25	21	53	34	21	21	25	44

Top 10

Week ending:	7/13/2008	7/20/2008	7/27/2008	8/3/2008	8/10/2008	8/17/2008	8/24/2008	8/31/2008	9/7/2008
Term 1	4	10	5	3	5	2	3	2	3
Term 2	5	2	4	6	7	2	3	6	8

U.S. Papers

Week ending:	7/13/2008	7/20/2008	7/27/2008	8/3/2008	8/10/2008	8/17/2008	8/24/2008	8/31/2008	9/7/2008
Us	59	80	36	88	33	43	33	21	20
Them	11	17	17	76	24	23	20	12	33

Top 10

Week ending:	7/13/2008	7/20/2008	7/27/2008	8/3/2008	8/10/2008	8/17/2008	8/24/2008	8/31/2008	9/7/2008
Us	9	16	5	11	10	5	7	6	4
Them	3	2	2	15	2	7	2	0	8

US Papers - Themes
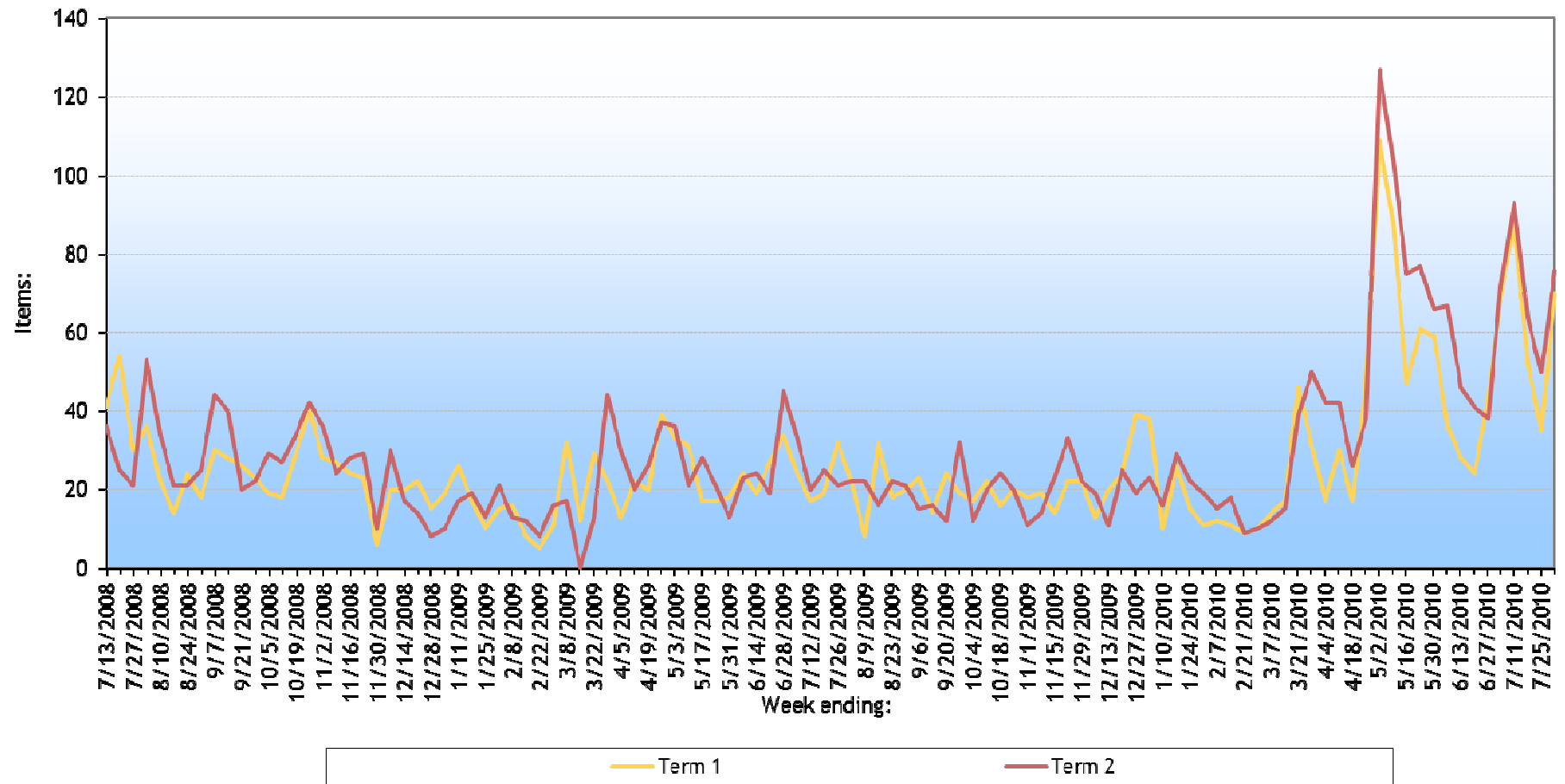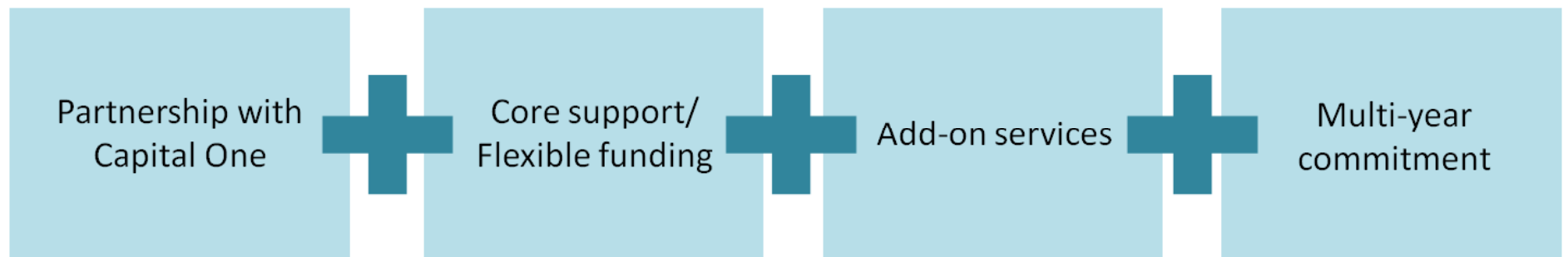
Partnership with Capital One **+** Core support/ Flexible funding **+** Add-on services **+** Multi-year commitment

Reflecting on partner feedback and our own observations throughout the three year partnership, we believe there are four essential elements of the Partners in Excellence model: partnership with Capital One; core support/flexible funding; add-on services; and a multi-year commitment.

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Partnership with Capital One	+	Core support/ Flexible funding	+	Add-on services	+	Multi-year commitment
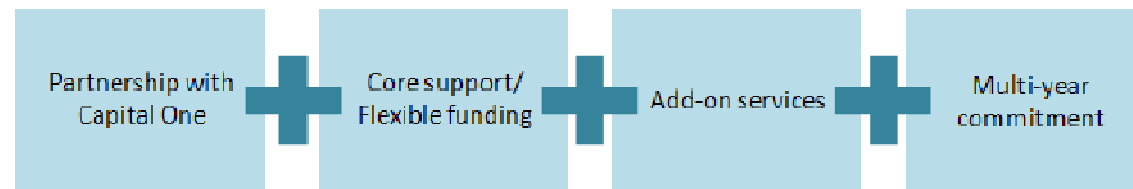
In the interview we asked partners if they enjoyed a similar relationship with any other funder. Unanimously, not a single partner could name another funder that provided a model as rich and helpful as the Partners in Excellence model. A few respondents actually laughed in response to the question. Some partners described relationships that reflected a component or two of the *Partners in Excellence* model:

- Partners had relationships with other corporate funders, but with less funding.
- Other funders also encouraged dialogue and discussion of funding priorities, but didn't offer core support/flexible funding.
- Partners had other multi-year funds, but with less funding.
- Partners had received other capacity building services, but not in tandem with funding.

In sum, no other funder could be named as providing the comprehensive support provided by *Partners in Excellence*.
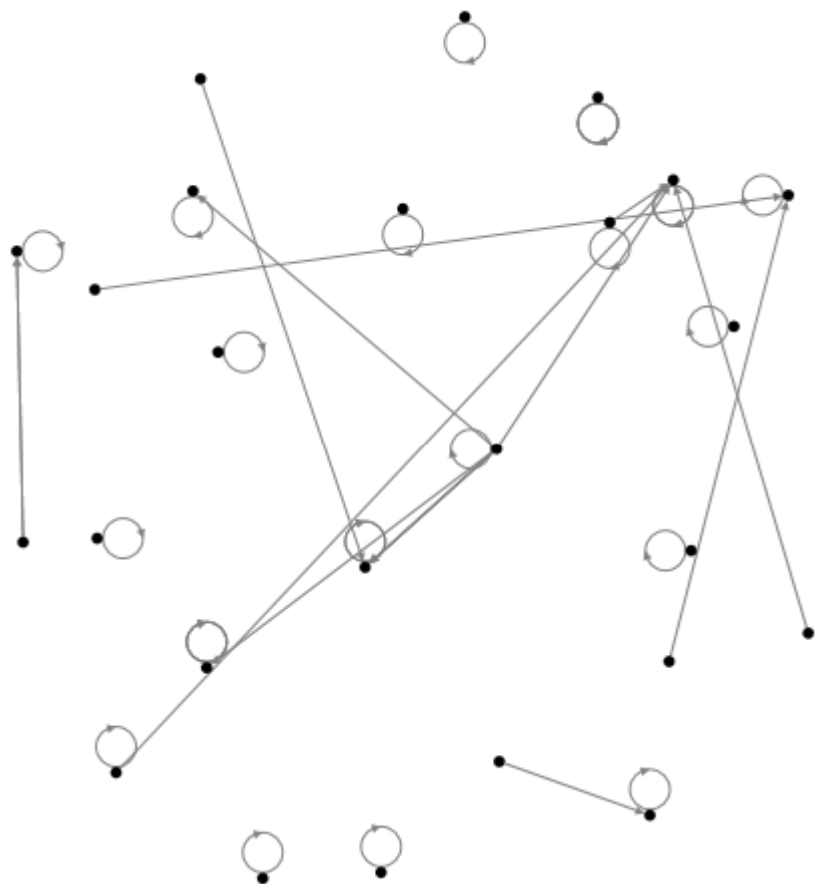
33

People who tweeted #eval11 as of 2011/10/31

Innovation Network
InnoNet_Eval

34
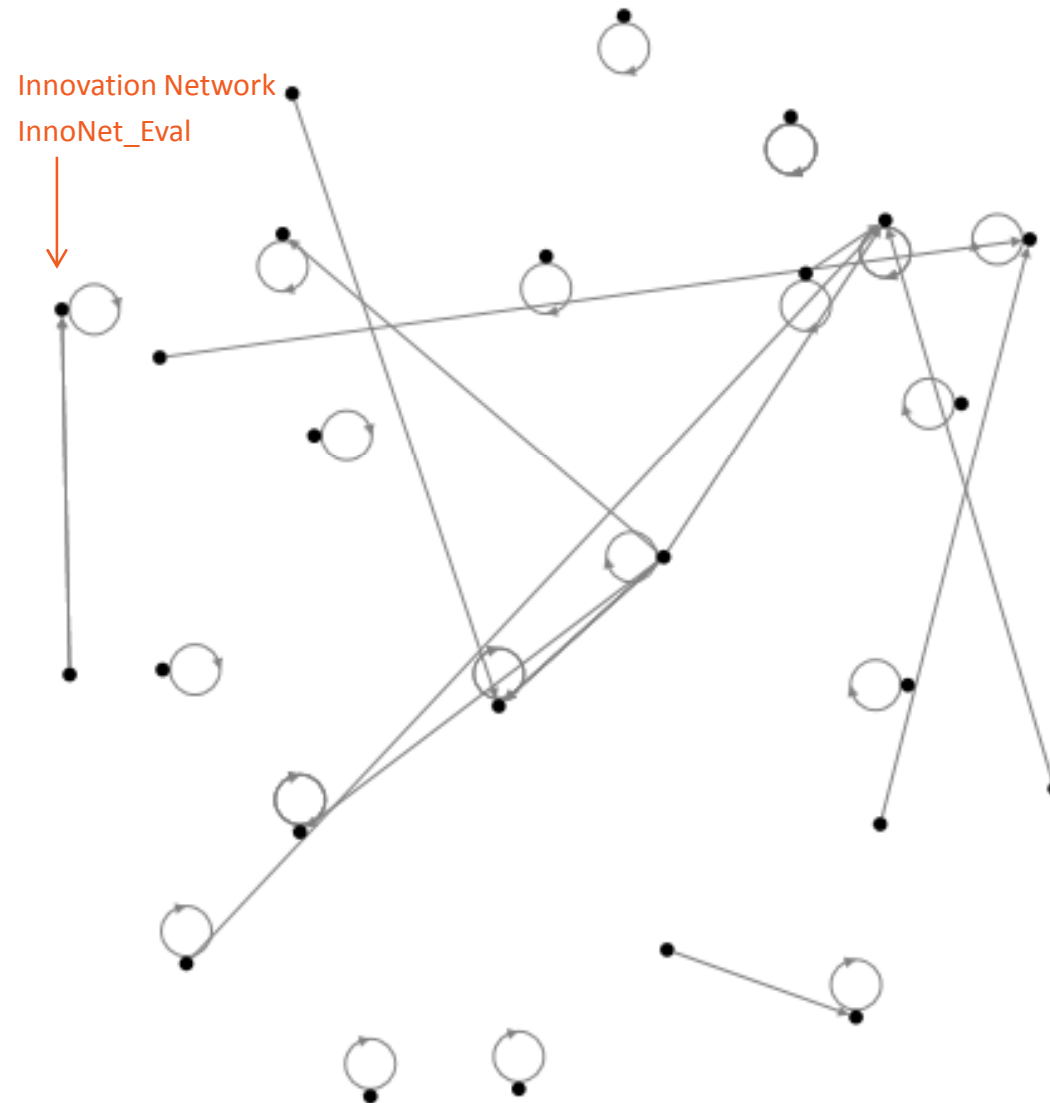
People who tweeted #ISconf as of 2011/10/31
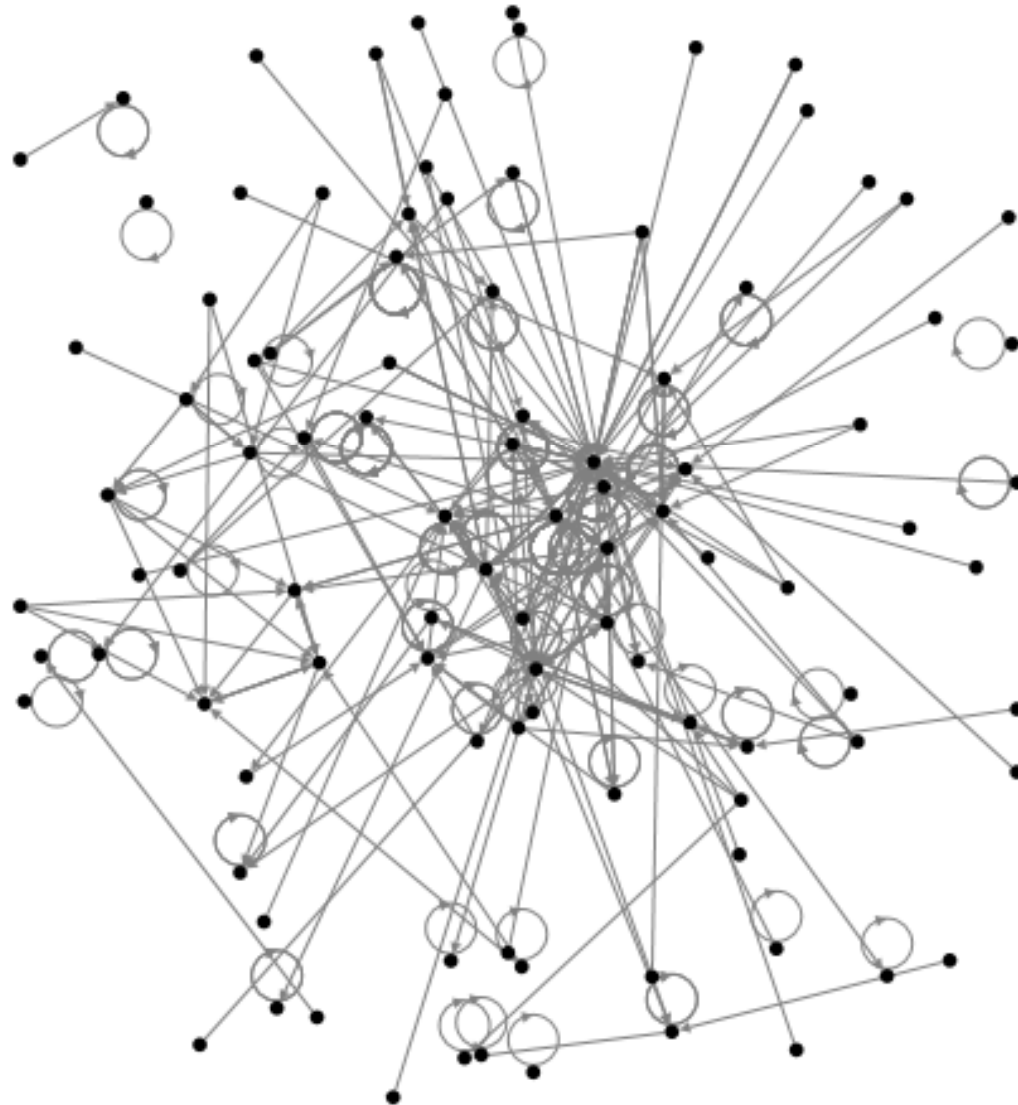
#eval11

#ISconf

Agenda = Evaluation Cycle

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| Menu | Brand Metrics | Advertising Metrics | Purchase Metrics |

Menu

Geographic Roll Ups

- World
- USA
- Canada
- Latin America
- UK
- Europe
- Russia
- Africa
- China
- Pacific

Product Groups

Brand Awareness
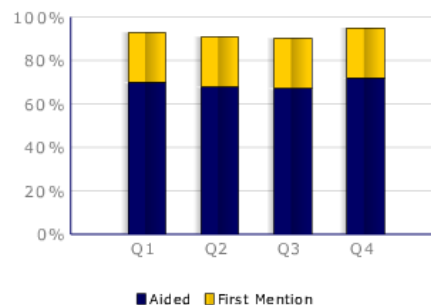
■ Aided ■ First Mention

Advertising Awareness

■ Aware of Advertising

Market Share

◉ Brand A ◉ Brand B ◉ Brand C

Brand Commitment

◉ Brand A ◉ Brand B ◉ Brand C

Source of Ad Awareness

■ TV/Movie Placement ■ TV Commercial □ Radio ■ Other
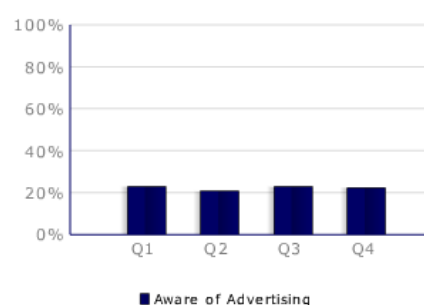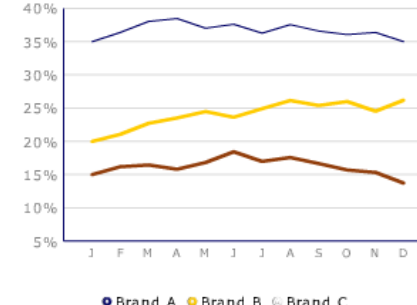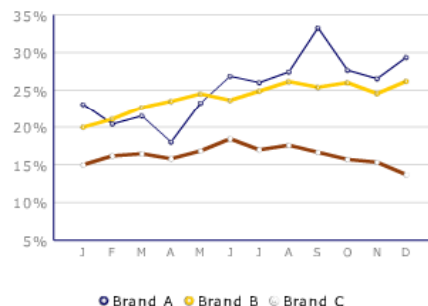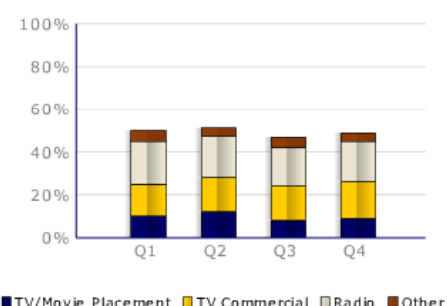
Frequency Profile

■ Heavy ■ Moderate □ Light
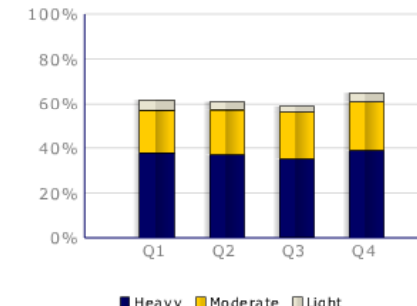
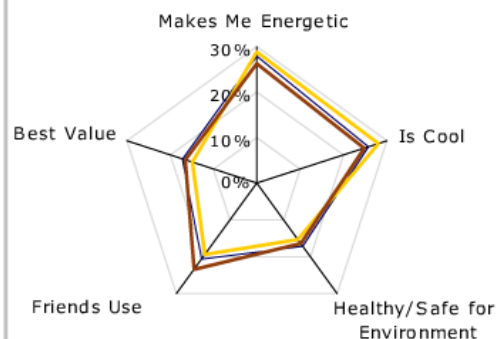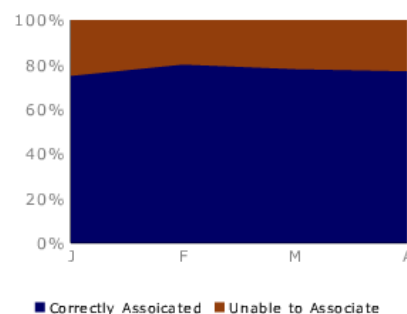## Status:

The current average position of all brands across the globe is strong considering recent upward pressure on cost from the rise in oil prices and political instability. General brand strength and advertising awareness continues to track favorably versus major competing brands worldwide.

Brand Attributes

Makes Me Energetic
Is Cool
Healthy/Safe for Environment
Friends Use
Best Value

Message Association

■ Correctly Associated ■ Unable to Associate

Repeat Purchase

■ Repeat Purchase

APPIAN ANALYTICS

Appian Analytics is a Global Market Insite company

GMI

		YTD	Benchmark
Training	% (out of n) of training participants who report increased knowledge / understanding	85% (120)	75%
	% (out of n) of training participants who report increased likelihood they will take action	73% (120)	70%
	# of times organizations report using our materials or request additional training	42	25
Publications	# of publications / resources downloaded	117	50
	# of citations / references made to publications / resources	62	25
	# of individuals who request publications, resources, or interviews	29	25
Partnerships	Avg. rating of partnerships BY PARTNERS	3.75	3.50
	Avg. rating of partnership BY STAFF	3.53	3.50
	# of times partners reach out to us for information, recommendations, materials, or assistance	28	25
Advocacy	% (out of n) of targets who report they will take action as a result of a meeting	34%	65%
	Avg. rating of perceived success of advocacy meetings	2.63	3.50
	# of policymakers or policy shapers who reach out for information, materials, or assistance	26	25
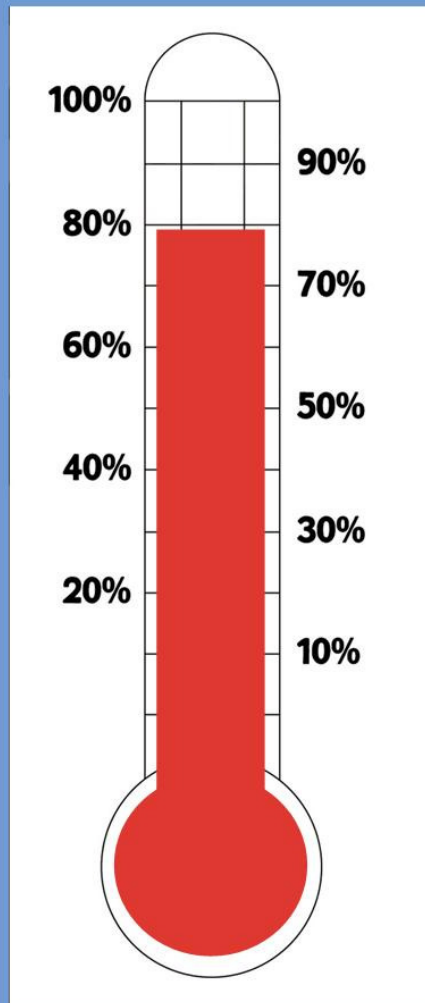
CAMPAIGN THERMOMETER

$2,454,514.36
82% TO GOAL

As Of January 27, 2011

TOOLS & RESOURCES

1) Data/Info Viz blog http://flowingdata.com/

2) Color inspiration www.design-seeds.com

3) Color diagnostic http://instant-eyedropper.com/

4) Open Source image editing http://www.gimp.org/

5) Creative Commons licensed images
http://www.flickr.com/creativecommons/

Evaluation + Data/InfoViz = ↑Participation & ↑ Capacity

We hope you agree.

Data and Information Visualization

Throughout the Evaluation Life Cycle

for Participatory Evaluation and

Evaluation Capacity Building

Thank You:)

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innovation network
TRANSFORMING EVALUATION FOR SOCIAL CHANGE