Q1

What are we really trying to learn? How will this learning lead to action?

These questions may be used individually or grouped together to form the basis of a more structured conversation about making evaluation useful. If you use them individually, it is important to remember that the sequence of the questions is important. Knowing the answers to earlier questions will increase the chances of successfully resolving later questions. It is difficult to talk about who will do how much of what if you aren't on the same page about whether you are applying the right evaluation approach. Similarly, choosing an evaluation approach requires a solid understanding of what you and your partners can each contribute to helping each other learn. Sometimes, backing up and asking questions near the top of the list is the best way to resolve issues related to later questions! It is also important to remember that these questions are focused on the *why* of evaluation rather than the *how* to. Question 3, about approaches, for example, shouldn't lead to a discussion of the pros and cons of qualitative data. Rather, the discussion should be about whether the overall approach fits with the particular learning goals that you and your partners have right now.

WHAT THIS QUESTION MEANS AND WHY IT MATTERS FOR USEFUL EVALUATION

Ultimately, all evaluation should be useful. It should be designed to help organizations learn and equip them to act in new ways. However, different kinds of information are useful in different contexts. Funders and nonprofits face different management challenges and need to speak to different kinds of audiences. It can be challenging to generate useful evaluation results if you don't understand your partner's learning goals. This question is designed to help stakeholders gain a better understanding of one another's learning goals (even if they are not yet clearly articulated). It can also be helpful, when asking this question, to learn more about how your partner organizations learn best. This question is designed to make evaluation more useful by clarifying the needs, interests, and styles of evaluation users.

At the end of the day, an evaluation project is a type of intervention. It is a series of activities (planning, data collection, sharing results, etc.) designed to lead to a specific kind of change (improved service, new funding, etc.). However, we rarely evaluate our evaluations to see whether they were successful. The idea behind this question is to get people thinking about what would count as success in the evaluation project under discussion.

HOW TO ASK IT

Evaluation is only worthwhile when it leads to action and usually the pathway to action goes through learning. It is important to remember that any healthy organization learns in a variety of ways and evaluation is only one of several tools that informs the process. The idea behind this question is for both nonprofits and other stakeholders to talk at a general level about what their own organizations want to learn and how they like to learn. Having new insights or aha moments is fun and energizing for most people and people enjoy the evaluation process more if they see it as having the potential to generate insights.

This question is also a chance to explore expectations about what will be achieved through evaluation work. If the evaluation work discussed at this meeting isn't tied to the participants' learning journey or if it is only going to help ONE of the participating organizations learn, then the obvious question (even if it isn't stated explicitly during the discussion) is what's the point?

WHEN EVALUATION IS FOCUSED ON LEARNING: Open & clear communication, trust, and collaboration > Meaningful outcomes
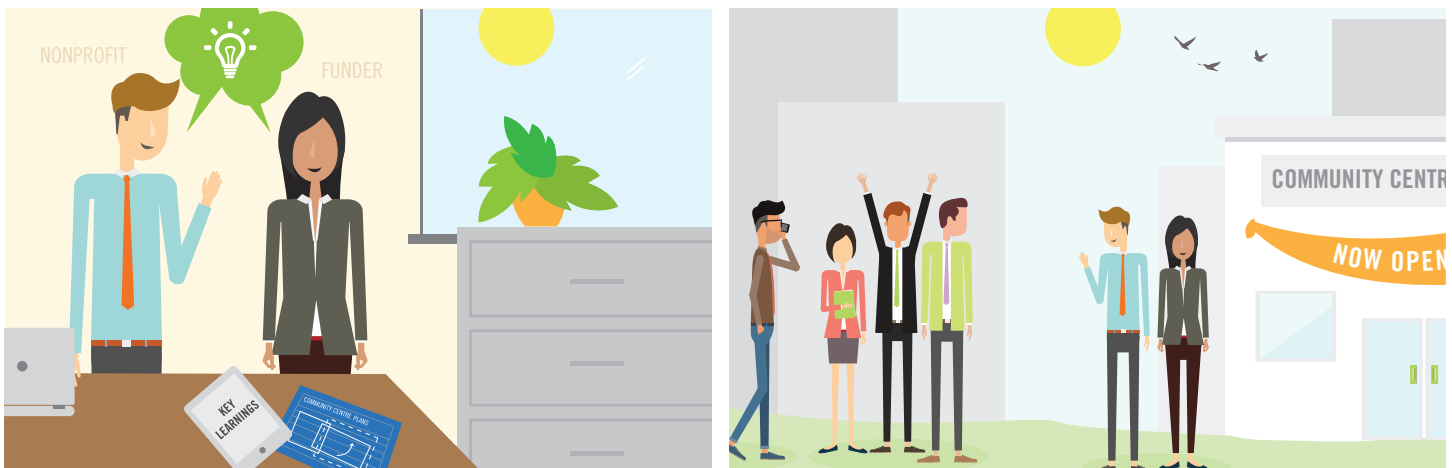
WHEN EVALUATION IS FOCUSED ON ACCOUNTABILITY: Unclear expectations, miscommunication, and frustration > Missed opportrnities

This question can be framed in many different ways.
Here are some additional questions that are designed to provoke high level discussion about learning goals and styles of learning.

How will it factor into decisions about future funding for us?

How does your organization or your team like to learn and reflect? Do you tend to produce reports? Do you chat over coffee? Can you give me an example or a story?

What are your most important learning goals?

Right now, what are the biggest questions you have about those goals? What do you want to learn most?

What unanswered questions are preventing you from acting on your goals? What don't you know?

Can you provide an example of an evaluation report that you found really useful?

Can you tell me more about how you intend to use this information? Who will you share it with? How will it factor into decisions about future funding for us?

How do you normally evaluate yourselves or reflect on your practice? What works best for you internally?

Do you have a good understanding of our agency's mission and goals? Do you have any questions about those?

Who are our key audiences for this evaluation work?

Complete this sentence: "If this evaluation went really well, it would enable me to _____."

What kinds of decisions will be made based on the results of this evaluation? By whom?

DISCUSSION STARTER

Here is an exercise that can be a good discussion starter. This exercise does not have to replace the questions above, but is rather another way to engage in conversation. We've talked a bit about the questions we want to ask in this evaluation and about the data that we plan to gather. Let's take ten minutes and write down a plausible guess as to what the ultimate findings of this evaluation might be.

Do these findings seem plausible to you? Given your evaluation plan, are these kinds of findings possible? ▶ Do these findings strike each of us as useful? ▶ What would we do if the results were very positive, very critical, or didn't show much difference? ▶ How, exactly, would you use them? What would be your next step if you got these results out of the evaluation?

?

WHEN AND WHERE TO ASK IT

This question is a good, non-threatening get-to-know-you question. It is especially helpful when the parties involved don't know each other very well. It can be a helpful question when it is the first time that your agency has received a grant from a particular funder or you may be meeting with a new representative from an existing funder. This question is also helpful in situations where the people representing the agency or the funder don't have a lot of experience with evaluation.

This question can also be asked later in the evaluation process (if asked in the form "what were we trying to learn?"). If an evaluation project has lost focus or generated confusing results, going back to the original purpose can be helpful. If there has been turnover of staff since the evaluation began (within your organization or on the funder side) discussion of this question can help to orient new people.

KEEP in MIND

CHALLENGES THAT MIGHT COME UP
STAKEHOLDERS ARE NOT READY TO HAVE THIS CONVERSATION

The most likely challenge at this stage is that people simply won't be willing to have this kind of discussion. This question isn't typically included in evaluation planning meetings so participants in the meeting may jump ahead to discussions of topics that they are more familiar with or topics that they see as more important, such as evaluation methods or funding requirements.

If you are the person initiating the discussion of this question, it will be your job to slow people down and make sure that they take the time to share their learning goals. Making space for this question may be especially important when:

The funder involved has a history of not providing feedback on evaluation reports or not using them for decision making.

Evaluation is being looked at as a bureaucratic requirement rather than a learning opportunity by the funder, the agency, or both.

One way to get people to slow down and spend time on this question is to give the floor to the practitioners in the room. People who spend the bulk of their work time on planning, policy, or measurement may be most likely to jump ahead to the technical questions, but those who work in the field or with people may feel more confident talking about how their organization learns and what it needs to know. Keep in mind that there are planners and practitioners in government and in other funding bodies too.

LEARNING GOALS AREN'T CLEAR

It can also be helpful to let people know it is okay if they feel their learning goals aren't particularly clear. That is a common challenge and talking about this question can be a good way to explore potential learning goals together.

YOUR CONTACT PERSON MAY NOT BE ABLE TO SPEAK ON BEHALF OF THE FUNDER AS AN ORGANIZATION

It can also be challenging to ask this question when the funder involved is very large (such as a government ministry). The representative that you are talking to may not know how their organization or department learns or what it hopes to gain from this particular evaluation. A good starting point in situations where you are dealing with a representative who may not know how their organization or department learns may be to ask them how their particular team would answer these questions.