

EVALUATION GUIDANCE

We agree with Grantmakers for Effective Organizations' 2012 *Four Essentials for Evaluation*: "Good evaluation systems depend on clear and reliable indicators. But grantmakers should be careful not to overdo it when it comes to developing metrics to assess their performance and that of their grantees." We support successful collaboration and continuous improvement by measuring key processes and outcomes, using metrics that groups develop during their formation and planning. We build reflection and adaptation into each annual cycle so that evaluation does not become an end in and of itself.

Each year, groups will:

1. Review and edit/affirm its evaluation questions
2. Participate in internal process evaluation (group dynamics)
3. Conduct community impact evaluation (goal attainment), if relevant
4. Review results, celebrate successes and identify adjustments

Groups may wish to form an *ad hoc* evaluation committee to lead evaluation, present its summary and hold the group accountable for adjustments to which it commits. Below are sample questions.

Internal Process

Supportive climate with strong interpersonal networks

- Meeting attendance (# at each meeting, % of listserv that participates in meetings, change since last year) [required/SDG to track and provide these numbers]
- Financial commitment (# and % group members committing funds, \$ committed) [required/SDG to track and provide these numbers]
- Trust among members: "I feel comfortable expressing my viewpoint, even if it is different than that of the majority." "I feel that my opinion matters in the group." [Always/Sometimes/Seldom]
- Participation: "I speak up, when I have something to say." [Always/Sometimes/Seldom]
- Responsiveness: "My opinion is taken into account by the group." [Always/Sometimes/Seldom]

Credible champion with time energy and resources

- The chair fulfills the responsibilities outlined in the chair job description
- Staff provide appropriate support
- Collaboration members understand the group's goals and theory of change
- Pace of movement towards goal: "I feel we are moving [too quickly, at the right pace, not quickly enough] towards our goal of X."

A ripe or unusual opportunity

- External opinions: put a few key questions to external partners about their interaction with the group, e.g., responsiveness, expectations versus outcome
- Do all members understand the groups goals—and have the same understanding
- Have any external circumstances changed that affect the groups' goals

Community Impact

- At minimum, measure progress on each element of the group's logic model or other framework
- If more extensive evaluation is desired, identify who will perform this evaluation and how it will be funded (if funding is necessary)