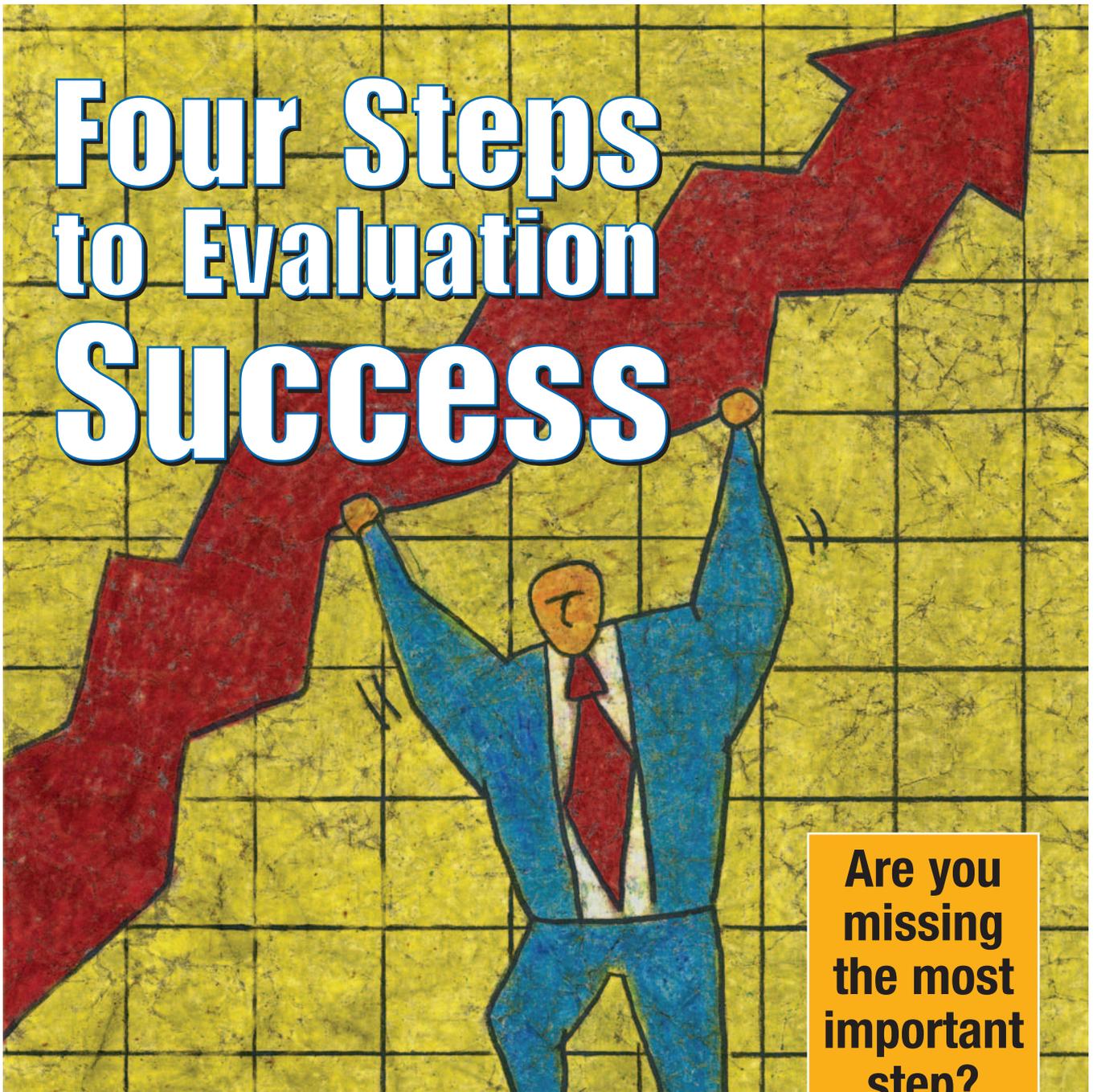


# Four Steps to Evaluation Success



**Are you missing the most important step?**

By William C. Minnis

**W**hen it's time to evaluate a program or project, most managers begin by reviewing their original objectives. This approach has grave flaws. Because the objectives were determined at an earlier time, they overlook changes in the operating environment.

Consider, for example, a project that was planned and launched a year earlier. When evaluating the project, managers typically compare objectives outlined in the plan against those actually accomplished. This approach measures performance, but it doesn't suggest improvements. Opportunities to strengthen the project are lost.

The best way to remedy this problem is to use a four-step evaluation model. Let's see how you can use these steps to improve results and stay abreast of a dynamic world:

## **Step 1: Take a Strategic View**

Begin your evaluation at the highest level of the model. Ask, "What changes and trends might impact the plan? Is the plan's original intent still on target? Will it continue to serve the organization's needs in the future?" Answering these questions will give you perspective on how changes in the environment may affect your tactics.

*continued on page 20*

# Four-Tiered Assessment Model

## A Strategic View

- Scan the external environment for changes and trends.
- Identify opportunities for your organization.
- Weigh stakeholder priorities.

## Objectives

- Review your original objectives in view of environmental changes.
- Gauge the impact of your organizational structure and resources.
- Reassess goals, taking current trends into consideration.
- Adjust your assumptions to meet your strategic needs.

## Performance

- Consider achievements in both short and long time frames.
- Check your projected budget against actual money expended, and study the effectiveness with which resources are being used.
- Analyze customer satisfaction.

## Implementation

- Use feedback to identify adjustments you need to make.
- Create action-oriented measures to meet objectives.

times overlooked, especially if too much value is placed on planning. Don't focus on planning at the expense of activating the plan.

Ideally, you should perform your planning and assessment processes at the same time. That way, you can use the feedback from your evaluations to update your plans.

Feedback is vital in the assessment process. Research shows that feedback systems improve performance. When gathering feedback, focus not only on ineffective performance and problems but also on results and goals accomplished. Then use that feedback to make changes and support successes.

### Tips to Make the Process Work

Here are do's and don'ts to assure that you get the most out of your assessment:

**Evaluate more often.** Organizations traditionally conduct evaluations once a year. That isn't often enough. Perform evaluations every four months. Such a time frame lets you consider new revenue opportunities. It also flags changes in personnel, funding, and service demands that will require you to amend your plans.

**Don't forget the relationship between assessment and planning.** The nearer the connection between the two, the greater the advantage of adjusting to change and identifying opportunities.

**Include all levels of the organization in the evaluation.** Often a different individual is responsible for each organizational function. This fragmentation of functions creates an environment of differing priorities and focus. For instance, the program manager, executive director, and board chair may each see a different issue as the highest priority. Unless you include all these people in the evaluation, the organization may

This first step is the one most often overlooked by managers. The assumption is that a three-year plan will remain accurate for the total three years. One can find many examples of this lack of big-picture thinking. The telecom industry, for instance, invested in capacity levels well beyond market demand. The consequence has been soaring competition combined with low earnings.

**The first step is the one most often overlooked by managers.**

### Step 2: Review Objectives

Second, consider your strategic plan and objectives in light of the environmental changes you identified in step 1. Measure your results against those changes. Ask these questions:

- Are your results consistent with current trends?
- Does your plan include all parts of the operation?
- Do your objectives integrate all levels of the organization?
- Are the original plan and objectives still valid? If not, how should they be adjusted?

### Step 3: Examine Performance

Next, assess how well you've achieved your original objectives, bearing in mind the insights you gained in steps 1 and 2. Tying this process to the first two steps assures that you connect performance to larger goals. Too often, people achieve high performance without doing what's required to move the organization closer to achieving its mission.

### Step 4: Make Changes

Now that you've taken a strategic view, reviewed your objectives, and examined performance, you can see what changes you need to implement. The importance of the implementation process is some-

## Don't focus on planning at the expense of activating the plan.

make inconsistent changes. The four-tiered model assures consistency by encouraging organization-wide inclusion, broad and narrow views of planning, and long and short time frames.

**Put as much emphasis on evaluation as on planning.** Most organizations focus a great deal of attention on planning and don't realize that assessment is just as important. The best plans are generated from effective evaluation.

Use the four-tiered approach for grants, programs, and as part of strategic planning. Doing so will

increase feedback to the planning process, encourage program coordinators to look beyond daily operations, and give you a great deal more control. Once you start using this model, expect to identify undiscovered opportunities, see higher levels of commitment and cooperation, avoid wasting resources on lower-priority activities, and improve your organization's response to a changing and challenging environment. ■

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\*Starred references are available from the Society's Resource Center. The articles from Volumes 14-23 are available free on-line at [www.snpo.org/members](http://www.snpo.org/members), and articles prior to Volume 14 are available on CD-ROM at [www.snpo.org/publications/articles.php](http://www.snpo.org/publications/articles.php).

William C. Minnis, Ph.D., is an assistant professor of management at Eastern Illinois University (600 Lincoln Avenue, Charleston, Illinois 61920-3099, [cfwcm@eiu.edu](mailto:cfwcm@eiu.edu)) and is an active consultant working with nonprofit community organizations. He was a health care administrator for 12 years and has been a successful grant writer, organizational planner, and program evaluator for more than 20 years.

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