DATA AND INFORMATION VISUALIZATION THROUGHOUT THE EVALUATION LIFE CYCLE FOR PARTICIPATORY EVALUATION AND EVALUATION CAPACITY BUILDING

Thursday, November 3, 2011, 10:45 – 11:30 am
• Mission: building evaluation capacity
• Evaluation and strategy consulting
• Social sector: philanthropic and nonprofit

Johanna Morariu & Veena Pankaj

• 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*. 
Evaluation + Data/InfoViz = ↑Participation & ↑ Capacity
DATA AND INFORMATION VISUALIZATION

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
1) Maximize data:ink

2) Make color and contrast work for you

- Emphasis
- Clarity
- Unity
- Flow

Color scheme courtesy of www.design-seeds.com
Figure 9: Awareness and Knowledge Changes Seen by Participants (n = 42)

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

- Awareness:
  - All, 24%
  - About 75%, 26%
  - About 50%, 21%
  - About 25%, 12%
  - N/A, 17%
Color scheme courtesy of www.design-seeds.com
3) Allow the purpose to select the medium
DATA AND INFORMATION VISUALIZATION

DESIGN PRINCIPLES

4) Avoid using codes/legends
World Gross Domestic Product (GDP) by Region Expressed in Purchasing Power Parity, Reference Case, 1990-2030

- 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)
Figure 9: Awareness and Knowledge Changes Seen by Participants (n = 42)
5) Classic graphic design principles

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/
DATA AND INFORMATION VISUALIZATION

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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.

Logic Model Diagram: Women at Work

Long-Term Outcomes
Participants move into higher-paying jobs

Intermediate-Term Outcomes
Participants obtain full-time paid employment

Short-Term Outcomes
Participants improve job skills

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
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

**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

**IMPACT**
Resilient communities and re-localized economies thrive within ecological bounds

**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

- **Evidence**
  - Randomized SIF evaluation begins

- **Funding**
  - Aligned funding in target states

- **Scale**
  - Tipping points for platforms and states defined

- **Ownership**
  - Leadership group formalizes intermediaries and identifies common strategies for funding

- **Platforms**
  - Cross-network learning and technical assistance needs identified

- **Initial evaluation findings from multiple studies**
- **Midform evaluation results**

YEARS 4 – 6: FIELD-BUILDING

- **Evidence**
  - Random Assignment evaluation in place (1-3 sites) and specialized studies begin

- **Funding**
  - Funding commitment from additional national funders

- **Scale**
  - Leadership group moves forward on state strategy

- **Ownership**
  - Common outcomes identified/explore creation of standards

- **Platforms**
  - Foundations support joint proposal/intermediary proposal

- **Initial evaluation findings from multiple studies**
- **Midform evaluation results**

- **Evidence**
  - Midform evaluation results

- **Funding**
  - Increased state funding in targeted states

- **Scale**
  - State policy change work underway and making progress

- **Ownership**
  - Common outcomes identified/explore creation of standards

- **Platforms**
  - Organizations report to funders using common outcomes

- **Evidence**
  - Share evaluation findings/Evaluation findings inform practice

- **Funding**
  - Gain funding support from federal funders

- **Scale**
  - State policies changed to support integrated strategies

- **Ownership**
  - Common outcomes identified/explore creation of standards

- **Platforms**
  - New strategic friends emerge

LONGER TERM OUTCOMES

- **Evidence**
  - Multiple evaluations have informed practice and policy

- **Funding**
  - Funding mix: 80 – 90% state & fed

- **Scale**
  - Robust field of implementing organizations with standards and high concentration in key states

- **Ownership**
  - Second generation leaders in place

- **Platforms**
  - New platforms, e.g., Early childhood, schools, employers?

- **Funding**
  - Tipping points achieved across platforms in targeted states

- **Scale**
  - Tipping points achieved by platform
Drawing provided courtesy of Colin Austin, caustin@mdcinc.org. Used with permission.
DATA AND INFORMATION VISUALIZATION
THROUGHOUT THE EVALUATION LIFE CYCLE
FOR PARTICIPATORY EVALUATION AND
EVALUATION CAPACITY BUILDING

Agenda = Evaluation Cycle
I. Planning
II. Data Collection
III. Analysis & Reflection
IV. Action & Improvement
Mindmap provided courtesy of Roberto Cremonini, Cremonini Consulting Network, roberto@cremoniniconsulting.net. Used with permission.
For more information about Eva’s work and Net-Map visit http://netmap.wordpress.com/
Agenda = Evaluation Cycle

I. Planning

II. Data Collection

III. Analysis & Reflection

IV. Action & Improvement
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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.
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.

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*. 
People who tweeted #eval11 as of 2011/10/31
People who tweeted #ISconf as of 2011/10/31
DATA AND INFORMATION VISUALIZATION

THROUGHOUT THE EVALUATION LIFE CYCLE

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Global Brand Monitor

Menu
- Geographic Roll Ups
  - World
  - USA
  - Canada
  - Latin America
  - UK
  - Europe
  - Russia
  - Africa
  - China
  - Pacific

Product Groups

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
  - Strong: 30%
  - Medium: 25%
  - Weak: 10%
- Best Value
- Is Cool
- Friends Use
- Healthy/Safe for Environment

Advertising Metrics
- Advertising Awareness
- Market Share
  - Brand A
  - Brand B
  - Brand C

Source of Ad Awareness
- TV/Movie Placement
- TV Commercial
- Radio
- Other

Frequency Profile
- Heavy
- Moderate
- Light

Message Association
- Correctly Associated
- Unable to Associate

Repeat Purchase

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

$2,454,514,364.36
82% TO GOAL
As Of January 27, 2011
Tools & Resources

2) Color inspiration [www.design-seeds.com](http://www.design-seeds.com)
Evaluation + Data/InfoViz = \uparrow\text{Participation} & \uparrow\text{Capacity}

We hope you agree.
DATA AND INFORMATION VISUALIZATION

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FOR PARTICIPATORY EVALUATION AND EVALUATION CAPACITY BUILDING

THANK YOU:

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innovation network

TRANSFORMING EVALUATION FOR SOCIAL CHANGE