Drive Evaluation studio

Simple Evaluation Strategies – Doing More with What You Have

Community Foundation for Greater New Haven

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Drive Evaluation Studio, Inc.
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Who is in the Room Today?

Basic needs and food access	Youth development and education	Early childhood and family support
Arts and culture	Health and wellbeing	Civic engagement and advocacy

Reframing Evaluation

"Evaluation is just paying attention on purpose."

What people assume it means:

- Expensive consultants and complex tools
- Something that happens after the work
- Only for grant reporting
- A burden that slows you down

What it can actually look like:

- A 15-minute monthly check-in with your team
- A 5-question survey after a program
- Pulling a trend from your intake records
- A habit, not a project

Three Right-Sized Strategies for Today

No special tools required.

1 **Mine Your Existing Data**

Your intake forms, attendance records, case notes, action logs already tell a story.

2 **Design Quick Pulse Surveys**

Short, targeted check-ins that take less than 5 minutes to complete (and actually get returned!).

3 **Build Evaluation Habits**

Simple team routines that make data feel like part of the job, not disconnected or extra tasks.

Today's Agenda

Welcome & framing: Right-sized evaluation

Part 1: Mining the data you have & activity

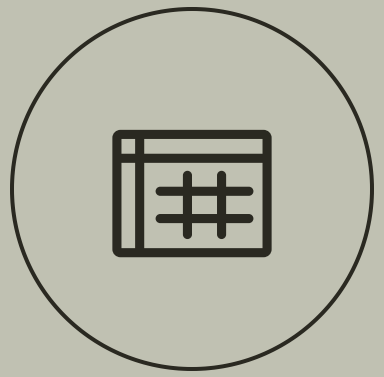
Part 2: Designing quick pulse surveys & activity

— BREAK (11:05 - 11:15 AM) —

Part 3: Building eval habits into your team & activity

Wrap-up: From data to story, follow-up docs, Q&A

In the chat: What is one thing you already do to track or learn from your work?



Part 1

Mining the Data You Already Have

You Probably Already Have Rich Data

The challenge for most organizations isn't collection; it's use.

Intake & Enrollment

Demographics, referral sources, presenting needs, eligibility info

Attendance & Participation

Session counts, no-show rates, duration of engagement, dosage, social media followers

Client/Participation Records

Case notes, service logs, goal-setting activities, milestone tracking, email threads

Program Outputs

Meals served, trainings delivered, units of service completed

Surveys & Feedback

Post-program satisfaction, funder-required assessments, compliments and complaints, Google reviews

Advocacy & Organizing Data

Petition signatures, action taker list, coalition attendance, legislator contacts, media mentions

Activity 1

Data Inventory – Sample First

Meet **Green Valley Youth Services**, a small organization running after-school tutoring for 60 students at three schools with a staff of five. GVYS is trying to report impact to a funder.

Data They Collect	Who & How Often	What It Could Tell Them
Enrollment forms	Program coordinator at intake	Who you serve; referral source trends; demographic reach
Attendance sheets (weekly)	Tutors, every session	Participation patterns; engagement over time; dosage
Report card copies (quarterly)	Families at check-ins	Academic progress before, during, and after enrollment
End-of-year parent survey	Email, annually	Satisfaction, perceived benefit, likelihood to recommend

Activity 1

Data Inventory – Your Organization

Individual, then we debrief together

List the data your organization currently collects
For each: Who collects it? How often? What has it been used for, and what could it be used for?

Data type or source	Who collects it and how often	How has it been (or could it be) used

Three Ways to Get More From Your Existing Data

01

Look for Trends Over Time

Compare months, cohorts, or years to show growth.

"Attendance at our housing counseling sessions has grown 34% over the past two years, with the sharpest increase among first-generation homebuyers."

02

Disaggregate by Subgroup

Break numbers down by a relevant criterion (e.g., age, location, referral source, or program type.

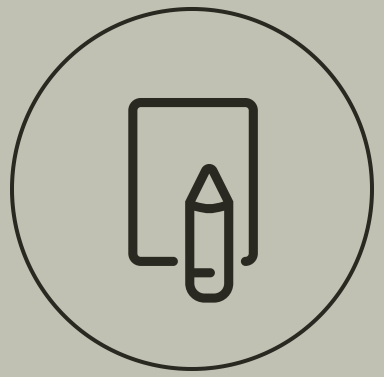
"Of the 420 constituents who signed our petition, 68% were from the three zip codes most directly affected by the policy, not just general supporters."

03

Connect Outputs to Outcomes

Link what you did to what changed – remember to answer "so what?".

"Of the 40 parents who completed our workshop, 34 tried at least one new strategy at home within two weeks."



Part 2

Designing Quick Pulse Surveys

What is a Pulse Survey?

A pulse survey is a short check-in (typically 3-7 questions), sometimes repeated over time. It is designed to gauge progress, satisfaction, or experience at a key moment in a program, campaign, or service.

When to use it

- At program midpoints
- After an action, event, or training
- When you sense something is off
- Before writing a report

What it replaces

- Long surveys (potentially)
- Relying on anecdotal staff impressions
- Squeaky wheel reporting
- Waiting until year-end to find out

What it is NOT

- A comprehensive evaluation
- Stastically valid research
- A substitute for deeper listening
- Something that requires dedicated software

Anatomy of a Good Pulse Survey

1 | **A clear purpose**
You know exactly what decisions this will inform before you write any questions

2 | **Five questions or fewer**
The longer it is, the more likely it is to get abandoned.

3 | **A mix of scales and open-ended items**
Two to three scale items plus one open-ended is a good base recipe.

4 | **Accessible language**
Plain language, no jargon. If your population is adults, a sixth grader should understand it.

5 | **Administration approach**
Find a time when you have participants, clients, or constituents with you

6 | **A plan for the results**
Before you send it, know: what you will do with responses, who will see results and by when, what discussions or changes will be informed by what you learn.

Sample Pulse Survey: Mid-Year Parent Check-In

After-school tutoring program (5 questions, 3 minutes) | Works equally well for post-action, community feedback, or coalition partner check-ins

1. My child looks forward to attending the program.

1 = Strongly disagree, 5 = Strongly agree



2. I feel well-informed about what my child does at the program.

1 = Strongly disagree, 5 = Strongly agree



3. Since joining, I have noticed positive changes in my child's confidence or school engagement.

1 = Not at all, 5 = A great deal



4. Is there anything the program could do differently to better support your child?

Open response

5. Overall, how satisfied are you with the program this year?

1 = Very unsatisfied, 5 = Very satisfied



ACTIVITY 2

Draft a Pulse Survey for Your Program

Individual, then debrief together

Ask yourself first:

1. What program, service, or campaign will I survey?
2. What do I most need to know right now?
3. Who will fill this out and when?
4. What will I actually do with the results?

Draft your 3 - 5 questions:

Q1:

Q2:

Q3:

Q4:

Q5:

Making Surveys Actually Work

Use tools you already have

Google Forms and SurveyMonkey's free tier are enough.

Time it right

Deploy immediately after a key touchpoint like the last day of a session, training, or action event. Do it while you have them with you, and consider an incentive (even tiny!).

Be transparent about use

Tell people what the survey is for and what you will do with the results.

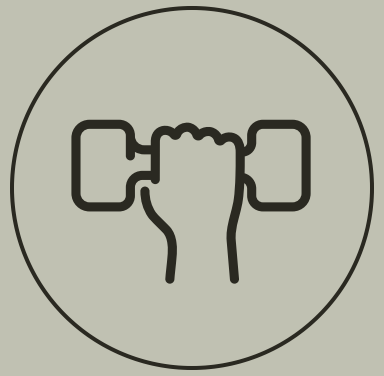
Close the loop

Share what you heard, even briefly: "You told us X, so we're trying Y." This builds the culture of responding next time.

THAT WAS A LOT.

Take a break.





Part 3

Building Evaluation Habits

Making data a natural part of how your team works.

Five Data Habits to Try

Monthly

Monthly data check-in

15 minutes at a staff meeting to look at one metric together. Not to analyze deeply, just to notice what's there.

At intake

One question at intake

Add a single open question: "How did you hear about us?" Or for advocacy orgs: "What's the issue that brought you to us?"

Per cohort

End-of-program exit check

3-5 questions on the last day. Capture it in the room, don't wait to send a follow-up email.

Quarterly

Case note pattern review

Pull 10 random case notes (or meeting summaries or action reports) and look for themes. What comes up repeatedly? What's missing?

Ongoing

The 'Aha!' log

A shared document (or Slack channel or Teams chat) in which staff capture surprises, challenges, and wins as they happen. This can be really valuable regardless of type of organization you are.

ACTIVITY 3

Pick Your Starting Point

Individual reflection, then share in the chat

Step 1: Choose the habit your organization could realistically start in the next 30 days:

- ◯ Monthly data check-in
- ◯ One question at intake
- ◯ End-of-program exit check
- ◯ Quarterly note/report review
- ◯ The 'Aha!' log
- ◯ Something else (describe)

Step 2: Write down ONE specific data point you will track with that habit:

The data point I will track:

In the chat: Your habit + data point in one sentence.

From Data to Story

Data become meaningful when they are connected to your mission and your people.

The Impact Sentence Formula:

In [time period], [your org] served/engaged [# people] through [program or campaign]. [X%] reported/achieved [outcome]. This matters because [why it connects to your mission].

For example: Service delivery

"Last year, 85 individuals accessed emergency financial assistance. 72% avoided eviction, and 60% remained stably housed six months later. Housing stability is the foundation on which other services and supports are built."

For example: Advocacy & organizing

"In our fall campaign, 320 community members contacted their legislators. 68% of them were from the zip codes most directly affected by the proposed policy. This supports what we have repeatedly seen — people with the most at stake are driving the fight."

Tools To Use After Today

1. Data inventory worksheet

Map what your org already collects, who owns each source, and where it is currently underused.

2. Pulse survey template

A fill-in-the-blank format with sample questions, guidance on length and timing, and a pre-send checklist.

3. Low-lift habits refresher

A one-pager with each habit and tips for getting started.

4. Impact sentence worksheet

A structured template to build a data-informed impact statement.



Questions and Discussion



Thank you!

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Session feedback

