December 5, 2010

How to Evaluate an IAF Action

1. Why do we evaluate IAF actions?

- To assess if and how our actions generate the reactions and desired changes we seek in our communities, states and nation.
- To improve the organization's and leaders' abilities to act in public life
- To model and teach evaluation as a core practice for our organizations and member institutions.
- To make sure people leave the action with a positive feeling, especially if the event didn't go as well as planned.

2. When do we evaluate?

- We conduct a group evaluation right after the action – what this FAQ is mainly about.
- We do individual evaluations with key leaders in the day or two immediately following the action – in person on more likely on the phone.
- We hold a more formal session with the key leaders 7 to 10 days after the action to discuss the action and reactions with some depth.

3. When and how do you start planning the post-action evaluation?

- The evaluation begins to take shape as you plan the action and set the goals you want to accomplish.
- Goals are developed with the team and shared at the rehearsal. They often include both internal and external goals. These were the goals for a recent action with the Illinois governor:
  - Make concrete progress on issues we care about
  - Model positive public life during a time of widespread cynicism
  - Deepen our relationship with the governor
  - Meet our turnout goal
- Leading up to the action, think about what you plan to teach at the evaluation.
- Find the room and arrange its set up; make sure the key leaders know they need to attend the evaluation.
- Prepare your evaluation notes the day before the action.
- During the action, take notes on the agenda to help you remember the key moments and words of the action.

4. What are the main elements of a post-action evaluation?

a. Rounds/quick check-in
b. Recap of main elements of action/main actors
c. Assess what was accomplished
d. Teach from the action
e. Grade and conclude

- Cover this in roughly 15 minutes.
- Do this in an interactive yet focused style.

5. **The rounds/check in question**

- Before you start, explain who this evaluation if for – the main leaders who planned and acted in the meeting. If others show up and try to dominate the evaluation, politely but firmly deal with them.
- We usually start with the question "what word captures how you are feeling after the action." I write this on the flipchart and underscore/bold "word."
- The purposes here are to "take the temperature" of the group (assess the mood of your leaders and incorporate that into the evaluation) and to see if any leaders are discouraged or in a funk.
- Keep this moving, hold people to a word or two, stop them from evaluating.
- With a big group, just call on the main people. Don't try to spend too much time here.

6. **Recap of the main elements of the action**

- I often have a summary of the agenda and other matters on the flipchart. For the October action it looked like this:

<u>Agenda</u> Opening/Welcome/Purpose Proposals and Governors Reaction Governors Remarks Closing Co-chairs Press Start on Time/End on Time? Turnout

- Don't go into every detail but cover the main pieces or "acts" of the action.
- Quickly highlight what happened and the roles key leaders played. Draw people in with questions like "How did we do at laying out our proposals; who stood out?" "How did the interaction with the governor go?"
- Lift up and teach from those who did well, especially those who put in a lot of effort or took a risk
- Other points to cover: How the co-chairs did, what press were there, logistics/parking, music/visuals, the floor team, and whether you started and ended on time.
- Have someone do an attendance count during the action so you have a good turnout number.
- Acknowledging the role the organizers played in the action toward the end is also OK.

7. **Assess what was accomplished**

- We do actions to generate a reaction, a power collision, if there is one, and the changes that may or may not result from it. We try to assess at this point if we got what we sought.
- I often have the goals written on the flip chart and ask did we meet each goal.
- It's usual to meet some goals and be mixed on others.

8. Teaching

- The purpose here is to tie this action to the ongoing work of building the organization and advancing its interests.
- Ask yourself what aspect of this action should be lifted up to help the group/leaders grow in their familiarity with and ability to use the universals of public life.
- Deciding which universal to highlight and how requires judgment – it's not a bad idea to consult with other organizers or your supervisor if you have questions on this.
- You can enter the action with an idea or two to teach in your head; which you choose may depend on how the action goes.
- This is not a long part of the evaluation – 2 to 3 minutes.

9. Grade and conclusion

- You can also provide a grade at the end of the "elements" section. Other times I use it to wrap up and summarize the action.
- Be realistic in your assessment and if need be consult with other organizers right after the action. If we're honest our actions are rarely "A" events. Most are "B" with some a bit better or worse.

10. Common problems to avoid

- Going too long: Leaders have often been engaged with planning and conducting the action over a period of days and need to return to private life. Shorter is better than longer.
- Too mechanical/scripted in covering too much: A crisp, engaging pace is best even if you miss a couple things.
- Avoiding the negatives/things that went awry. We owe it to our leaders to give honest feedback especially when things don't work out as planned. Sugar coating doesn't help our leaders and organizations develop.