SOCIAL INNOVATION

UNIT TWO: Project Planning

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COLLEGE

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Unit Two: Project Planning

Introduction

I f you have completed Unit One, you will have learned some effective techniques for developing your social innovation idea. Now, Unit Two is designed to help you set up your social innovation idea for success. Particularly on how to set attainable, and measurable goals that will set up your social innovation for success.

As you learned in Unit One, the ultimate goal of social innovation is to have an impact that creates a social good. At this point, you should be able to identify a solution to a social problem, and utilize input from a variety of stakeholders to hone your idea. Now, what steps can you take to effectively implement your project?

In Unit Two you will learn techniques to set realistic goals, develop a step by step plan to achieve these goals with the resources available, and measure your project's success.

The approach for Unit 2 will build on the work from the previous unit, therefore you can apply the techniques to previous examples. If you are developing your own social innovation project, you can apply these techniques to your development process.

In this unit you will be covering the following topics:

Topic One: Defining Project SMART Goals

Topic Two: Project Planning: The Devil is in the Details

Topic Three: Evaluation Planning: How are we Doing?

Learning Objectives

Here is what you will be able to do at the end of this unit to support the module learning outcomes:

- Utilize the SMART goal guidelines for planning achievable project goals
- Effectively initiate a project plan
- Assess the success of your project through quantitative and qualitative evidence

Key Concepts

Topic One

- SMART Goals
- Outcomes
- Objectives
- Evaluation
- Performance
- Conditions
- Criteria

Topic Two

- Simple Work Plan
- Detailed Work Plan
- Logic Model

Topic Three

- Developmental Evaluation
- Quantitative Information
- Survey
- Qualitative Information
- Interview
- Closed-Ended Questions
- Open-Ended Questions

Learning Activities

Complete the following practical learning activities:

1. Complete Learning Activity 2.1: SMART Goals Technique
2. Complete Learning Activity 2.2: Work Plan and Logic Model Techniques
3. Complete Learning Activity 2.3: Evidence Planning Techniques
4. Complete Learning Activity 2.4: Evaluation Questions Technique

Recommended Performance Evaluations

To show you have learned the material, here is what you may be asked to complete:

1. Unit Reflection
2. Discussion

Topic One: Defining Project SMART Goals

Social Innovators on the Ground Say

" We had our own goals and objectives with each individual partner. I try to communicate these goals as much as I can with the group so that everybody feels like they are unique while being a part of a cohesive whole."

Often at the start of a project we set big goals for our project. We may want to improve the health and wellness of all Canadians – or change the world in other ways. However, when goals are too big they can lead to confusion about where to start. Breaking down a big goal into smaller ones can be less daunting, and show a logical approach for achieving your goals. Often, putting in place smaller goals as your project moves forward can be helpful. These are referred to as **objectives.** To illustrate how a goal will be achieved. One way to ensure your goals and objectives are feasible is by using the **SMART approach.**

S	Specific Does the goal focus on one individual task, project, context or behavior that focuses on a single end result?
M	Measurable Is the goal observable and measurable with details that can be counted or seen?
A	Attainable Is the goal realistic and achievable; is it within a person's available resources, workload, timeframe, and abilities?
R	Relevant Is the goal related and meaningful to the problem you are trying to solve, does it accurately reflect the situation, context, circumstance, or reality?
T	Time bound Does the goal have a clearly defined time frame, deadline or specific dates assigned to it?

SMART Goals Definition. Image adapted from TOWES: Goal Planning Essentials. Unit 1: The SMART Goal, p. 4. Retrieved on November 20, 2017.

Notice that the SMART approach can be easily tied to important stages in a project.

Keeping your goal specific and relevant ties back to your work on defining the problem in Unit One. Ensure that your goals can be tied back to the problem and the challenges you identified at that stage of project planning. Continually checking if your goals will meet what you set out to do is an excellent way to set yourself up for success as the project goes along. If you completed work on the problem definition, you may want to refer back to this work when setting your SMART goals.

The importance of the rest of the letters will become clear after finishing this unit, but a particularly important part of the smart goals focus on *measurable* information. This is an important part of assessing the impact of your innovation. Though it can be challenging to think of measurable impacts, or outcomes the benefits of measuring your goals will help you demonstrate how your project was successful. These measurable goals will be important for evaluation of your project. You will learn the importance of evaluation later in Unit Two.

An effective SMART Goal not only ties to the definitions in the SMART. It should also address three criteria:

Performance

What the project should be able to do or produce at the end?

Conditions

What is needed from the team, or environment in order to reach that level of performance? What may hinder this?

Criteria

What level of achievement do you set for yourself in order to consider the goal achieved.

Why don't you try setting some SMART goals of your own in the following activity?

Learning Activity 2.1: SMART Goals Technique

Directions

1. Read the two examples.
2. Using the SMART Goal Template break down the potential goals and think about the different SMART areas
3. Respond to the Questions for Consideration

In a set of recent interviews conducted by Bow Valley College with social innovators the following goals were expressed:

EXAMPLE ONE

To help the community come together to support children, youth and families who were experiencing difficulties after a major disaster. As well as build capacity in the community to provide mental help supports.

Possible Goals:

1. Improve mental wellness through a recovery program centered on children and their families.
2. Build capacity through demonstrating mental health support for children and families.

Attainable objectives

- Help a certain number of children
- Establish community locations where wellness and recovery techniques are promoted
- Become an approachable resource for mental health in the community while working with other community workers in similar areas.

Performance:

Provide wellness approaches in the community and have community members capable of the same.

Conditions:

Adoption of the methods by the community and stakeholders.

Criteria:

Setting the number of children and families seen.

EXAMPLE TWO

To prevent the run-around experienced by individuals who need to access multiple social services by creating a streamlined process of collaborating organizations who often see the same people.

Possible goals:

1. Provide an integrated recovery program for individuals suffering from interrelated social and health problems.

Attainable objectives

- Partner with social services that are experts in the social problems they want to address
- Establish a cohesive system between partner organizations for information sharing about clients with interrelated social problems
- Test the system by presenting the streamlined service to clients of social service programs.

Performance:

Provide a set of services to individuals in need of multiple social service supports. Show that it is a viable model for social service organizations

Conditions:

Partners to agree on process and how to work together. Feedback on the project is positive.

Criteria:

Set a number of individuals put through the service model. A number of organizations interested in an integrated service.

Now use the Smart Goal Table to develop goals based on the example, or for your social innovation idea. Keeping in mind all you have learned from this topic.

DEFINING SMART GOALS TECHNIQUE	
IDEA	
GOAL	
S	Specific: Does the goal focus on one individual task, project, context or behavior that focuses on a single end result? How?
M	Measurable: Is the goal observable and measurable with details that can be counted or seen? How?
A	Attainable: Is the goal realistic and achievable; is it within a person's available resources, workload, timeframe, and abilities? How?
R	Relevant: Is the goal related and meaningful to the problem you are trying to solve, does it accurately reflect the situation, context, circumstance, or reality? How?
T	Time bound: Does the goal have a clearly defined time frame, deadline or specific dates assigned to it? How?
PERFORMANCE	
CONDITIONS	
CRITERIA	

*Defining SMART Goals Technique adapted from TOWES Goal Planning Essentials

Workbook: Unit 1: The SMART Goal, p. 4. Retrieved from
http://www.towes.com/media/43725/bvc%20mod%201%20unit%201%20july.16.p.pdf

 Retrieved on November 20, 2017.

Questions for Consideration:

1. Can you think of an additional goal for the social innovation examples that addresses the SMART goals?

    [ ]

2. Given the examples which social innovation is better prepared to develop effective SMART Goals?

    [ ]

3. What areas of SMART did you find more difficult to develop for the examples?

    [ ]

4. Which area(s) of SMART do you think are the most valuable to have in your project plan as you move forward with your idea?

    [ ]

Topic Learning Checklist

Can you identify?
☐   The SMART goal areas and give examples
☐   What an outcome and objective are
☐   What potential performance, conditions and criteria you would use to measure your goals
☐   Any goals in the examples that need to be better defined using the SMART guidelines.

Topic Two: Project Planning: The Devil is in the Details

Social Innovators on the Ground Say

" Take time to plan. Initially we took it all in and see where we were needed rather than just jump in with both feet, then after when we did jump in with both feet we knew that we could do what we needed to do, and we just did it. "

Making good ideas "happen" doesn't just happen. Good planning is one of the key factors that can ensure the success of your project. Overlooking some of the details involved in planning can sometimes result in unnecessary setbacks or even total failure. Certainly, the unexpected happens in all projects, and plans need adapting or changing. But every project needs a road map. There are many sophisticated tools and resources that can be used for planning, but one way to start is to simply work backwards from your goal. Ask yourself:

- What do you want to accomplish?
- What do you (or others in the project) need to do to make that happen?

Once you have outlined the main steps of what needs to be done, visit each step and define the tasks that need to be done to make that happen.

Now think about the example social innovations, or your own project. What tasks would be needed to achieve your goals?

Learning Activity 2.2: Work Plan and Logic Model Technique

Social Innovators on the Ground Say

"The ideas changed all the time about what the partners wanted to do. So, we may have thought that somebody with an established business has a clear direction of where they are headed and that really didn't prove to be true in practice. Which doesn't mean you don't want to work with them, but as researchers you need to be pretty nimble and flexible and be able to change course according to the partners needs or interests."

"A very precise mandate at the beginning, but as the community's needs changed and there needed to be flexibility with the program which ended up working fabulous ...so that it wasn't a rigid program and it seemed to be able to bend with the needs of the community and with the people that they were servicing."

If you have done the feasibility assessments in Unit One, it can serve as an important planning tool. Now you can add to the feasibility assessment by reviewing the activities you would like to accomplish related to your SMART Goals.

Ask these or similar questions:

- How can you break down a project goal into smaller attainable steps?

>

- What needs to be done to make these happen?

>

- Who is responsible for this?

>

- At what stage should this be done?

>

- By when should it be completed?

>

Directions

1. Review the questions
   a. Complete the *High-Level Work Plan*
   b. Complete the *Detailed Work Plan*
2. Complete the *Rich Uncle Logic Model*
3. Respond to the Questions for Consideration

Think about these questions by completing the following:

HIGH-LEVEL WORK PLAN TECHNIQUE				
Project Goal				
Rank	**Task**	**Resources Needed/Who**	**Date Due**	**Completed?**
1				
2				
3				
4				

Work Task Planning Technique adapted from TOWES Goal Planning Essentials

Workbook: Unit 3: Creating a Work Plan, p. 22. Retrieved from
http://www.towes.com/media/43737/bvc%20mod%201%20unit%203%20july.16.p.pdf. Retrieved on November 20, 2017.

Be sure to invest some time thinking about activities and ways you can develop your project to carry on after the timeline of your project. Thinking about the end of your project now, can set you up to continue to make an impact in the future even if the current project ends.

Some potential questions:

- How can the people and resources you have continue to make an impact?

  (e.g., do they share your vision, are they trained at the end of the project to make a difference in the community.)

- How can your ideas be incorporated into more initiatives around the problem you want to solve?

Now think about potential barriers that could impede progress for your project, as well as potential solutions and include that in your table as well.

DETAILED WORK PLAN TECHNIQUE						
Project Goal:						
Rank	Task	Resources Needed/Who	Date Due	Completed?	Anticipated Obstacles	Possible Solutions
1						
2						
3						
4						

Work Task Planning Technique adapted from TOWES Goal Planning Essentials

Workbook: Unit 3: Creating a Work Plan, p. 23. Retrieved from
http://www.towes.com/media/43737/bvc%20mod%201%20unit%203%20july.16.p.pdf. Retrieved on November 20, 2017.

Now that you've had some practice with developing goals and creating actionable tasks to achieve them, how do we put them all together in a project plan? A **logic model** is often used to illustrate how the project activities and resources will achieve your desired goals. These are often useful, when you are wanting to develop a proposal for funding to show that your project is well thought out and achievable.

To get a sense of how to develop a logic model, let's use an activity developed by Dr. Gail Barrington. Here, she uses a "rich uncle" as the person who is looking at your plan to make sure it is sound. As you learned in Unit One, the feasibility of your project is important for getting others on board and invested in the project. If you completed the feasibility techniques in Unit One you can refer back to them as you apply this activity to your own ideas.

Once you have completed this activity you should easily be able to use the steps for your own project.

RICH UNCLE LOGIC MODEL TECHNIQUE

Context: Your rich uncle is willing to give you $30,000 for a car, but in order to get the money you need to explain why you need it.		
Step 1: **Purpose**	List at least **three** compelling reasons why you need the car.	Why does your project matter?
Response:		
Step 2: **Resources (Inputs)**	What will you need to have organized and in place before you get the car?	This will show that you are organized and know what it takes to implement your project (Resources/people)
Response:		
Step 3: **Main Activities**	Your uncle wants to get an idea of how you will use your car on a regular basis. What are **three** main activities you will be doing?	What are the main activities of your project that you will move your project forward?
Response:		
Step 4: **Evidence of Use (Outputs)**	Your uncle lives far away, and he wants to make sure you spent his money on a car and that you are actually using it. What **concrete proof** could you give him every 6 months that shows you are using his money correctly?	What **measurable** ways can you show that you are achieving your goals? These are often used to report on your activities.
Response:		
Step 5: **Outcomes**	Finally, after three years you suddenly hear from your uncle that he will be coming for a visit. You are going to want to show him how the car has improved your life. What are **three** things can you show him?	These are the overall outcomes of your project. What impact have you made?
Response:		

*My Rich Uncle Logic Model adapted from Barrington Research Group. Logic Model Worksheet for My Rich Uncle Exercise. Retrieved from: http://www.barringtonresearchgrp.com/publications.html Retrieved on November 20, 2017.

You have now made a basic logic model.

Notice that measurable evidence is highlighted in Step 4. How can you provide proof of the effectiveness of your project in Step 5? One way is to evaluate your project. You will learn about evaluation in the next topic.

Note:

It is important to have an initial, well thought-out, feasible plan. However, it is also important to be flexible as you can see by the quotes. Many social innovators express that you should be adaptable in order to respond to changes along the way. Changes can happen by learning some ways to evaluate your project in the next topic, you can find ways to measure success at multiple points during your project so that you are learning what works and what doesn't as you go.

Social Innovators on the Ground Say

"The ideas changed all the time what they wanted to do. Initially we may have thought that somebody with an established business has a clear direction of where they are headed, but that really didn't prove to be true in practice. Which doesn't mean you don't want to work with them, but as researchers you need to be pretty nimble and flexible and be able to change course according to the partners needs or interests. "

"We had a very precise mandate at the beginning, but as the community's needs changed and the target group needs changed so having a flexible program was fabulous. It wasn't a rigid program, so it seemed to be able to bend with the needs of the community and with the target group that they were servicing.."

Questions for Consideration:

1. How did the project planning activity refine your SMART Goals?

2. How did the project planning activity help you be aware of risks and solutions to help you manage your project?

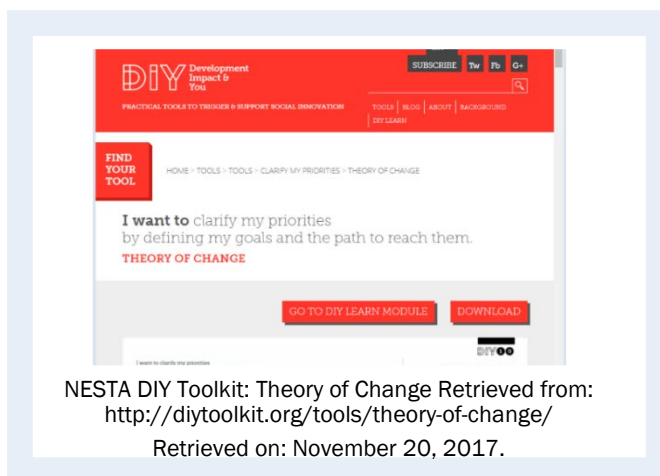3. How might the work plan techniques help you on a day-to-day basis?

4. How might the logic model help you when evaluating your project?

For a more advanced project planning workflow and logic model see the following in the supplementary resource section.

NESTA DIY Toolkit: Innovation Flowchart. This flowchart is a more thorough form of the work-task planning technique that includes a detailed plan and higher-level decisions.

NESTA DIY Toolkit: Innovation Flowchart Retrieved from: http://diytoolkit.org/tools/innovation-flowchart-2/ Retrieved on: November 20, 2017.

NESTA DIY Toolkit: Innovation Flowchart. This flowchart is a more thorough form of the work-task planning technique that includes a detailed plan and higher-level decisions.
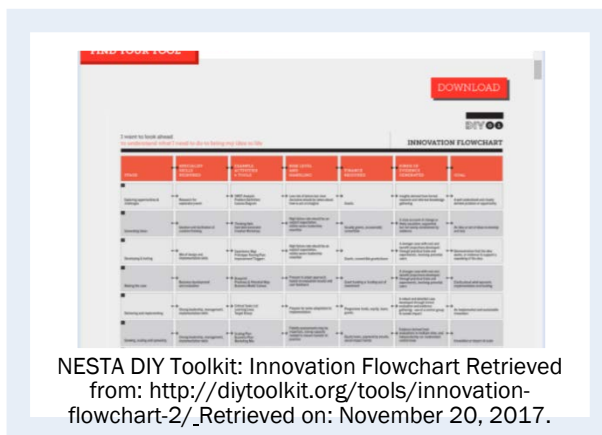
NESTA DIY Toolkit: Theory of Change Retrieved from: http://diytoolkit.org/tools/theory-of-change/ Retrieved on: November 20, 2017.

NESTA DIY Toolkit: Theory of Change worksheet. Theory of change is another term for a logic model. This worksheet follows many of the same steps as the logic model activity you worked through, but adds key assumptions that you are assessing at each stage of the model.

Topic Learning Checklist

Can you identify?
☐ Are you able to connect your original project SMART Goals to manageable tasks in your project plan?
☐ Can you identify the people you will need to help you complete your tasks?
☐ How thinking about potential barriers can help in project planning?
☐ How your goals connect with the rest of the planning activities in a logic model?

Topic Three: Evaluation Planning: How are we Doing?

Many people tend to think of evaluation as something that happens at the end of a project that indicates whether or not a project has been successful. Indeed, most people will want to know whether or not a project is successful. But actually, evaluation should be an ongoing process that allows you to get feedback, so that you can make changes and adaptations as required. One form of evaluation that allows for such flexibility is called **developmental evaluation** which can be extremely useful.

Social Innovators on the Ground Say

" The evaluation will help us when we do collaborations again in the future – What parts worked brilliantly and what parts of the collaboration, when looking at the cost and benefit, were not strong enough."

"The project team were responsive to changes in terms of data collection tools. So I think part of it was that team and their willingness to be flexible and approachable with implementing the various projects. "

As you put your unique idea into practice you are learning what works and what does not this is the part of social innovation that can be among the hardest to determine. It is therefore important to plan your evaluation activities at the very beginning of the project – after you have set your project goals. If you have formulated SMART goals in Topic One, you will recall the "M" of "SMART" asks "can it be measured?" Or, more simply "how will you know you're meeting your goals?" It may be helpful to review this portion of your SMART goals, and decide when, where, and how to evaluate the project. Although it may seem difficult to measure a social impact, there are some basic concepts for measuring that you can apply early and often in the project.

To start planning the evidence you want to gather. It is helpful to go back to questions from previous units such as:

- What is unique about your project

- What is the overall goal of your project?

- Are the goals you've developed for your project measureable

  What are some concrete ways you can measure your goals?

At the start of your project you may not have as much evidence, but you should jot down the question you want to answer, or provide evidence for. As you go through this topic you will learn strategies on how to gather information by asking different questions.

By making note of what you want evidence for, you can make sure to answer them. Your questions may grow or change as the project progresses, but making note of changes and evidence to support these changes from beginning middle and end you are well positioned to show how your project worked from idea to practice.

The following activity can be used to develop a template for linking your goals to evidence

Learning Activity 2.3: Evidence Planning Technique

Directions

1. Using the table below, fill in your goal the objectives and outcomes you've developed, and potential sources of evidence.
2. Think about the measurable evidence you need. Think back to your SMART goals, and project planning activities.

EVIDENCE PLANNING TECHNIQUE		
ENHANCE What does your project bring new value to? What evidence do you need?	**GOAL OF YOUR PROJECT** **OBJECTIVES**	**REPLACE** How does the project show that new ways are more desirable? Can your project be used in different contexts? What is your evidence do you need?
What does your project bring new value to? **RE-USE** What evidence do you need? What evidence did you collect?	**OUTCOMES**	What evidence do you have? **LIMIT** What are the limits of your project? What evidence is important not take out of context?

*Evidence Planning Technique adapted from Nesta DIY Toolkit: Evidence Planning Retrieved from: http://diytoolkit.org/media/Evidence-Planning-A4.pdf Retrieved on: November 20, 2017.

Now, what kind of information do you need to fill in the rest of the table with evidence? To gather information about your project you can use two types of information:

QUANTITATIVE INFORMATION

Quantitative information relates to that which can be counted or represented numerically.

Albert Einstein is quoted as saying: "Not everything that counts can be measured, and not everything that can be measured, counts."

Very true, success cannot always be expressed numbers. But numbers can send a powerful message. Recall that when setting up your SMART goals you established a criteria for meeting your goal. This goal information can be counted and tracked and can help you set a level for success of your project. This is often key information for evaluation. Mostly because it can give a lot of cues.

Let's look at an example:

EXAMPLE

Thirty people attended your first activity, and only five the next one. This may suggest a number of things that will need to be explored further by other evaluation techniques (below). Particularly, why there are fewer attendees for your second activity. But if there is a continually high number of participants, it tells you that something is going right! If you have developed a website for your project you may want to keep track of the number of visits to your website or develop a short feedback survey for your event. When gathering quantitative information it is important to know what questions to ask, and how to ask them.

From this example you can see the relevance of counting the number of participants at each event to compare the level of attendance from one event to the other. Then you might want to ask follow up questions to really understand the questions your curious about.

Developing Effective Survey Questions

Aside from simply counting, quantitative information is usually acquired through the use of a **survey.** A survey asks people to respond to a number of questions either with a simple yes or no answer, or often, by asking them to rate, (say, on a scale of 1 to 5) or by asking whether they strongly agree, agree, do not agree, or strongly disagree).

These are targeted questions that you can answer to provide you with useful feedback in the percentages of positive and negative responses.

Let's say you asked some survey questions in addition to add evidence to the fall in attendance. Some questions you could ask in this style are:

- Would you recommend this event to a friend? (Y/N)
- Would you attend an event like this in the future? (Y/N)
- Is the content of the event relevant to your work? (Y/N)

But in order to ensure that you get accurate information from the survey, it is important to learn how to ask the right questions. The following guide will assist in developing good survey questions:

STEP	DESCRIPTION
1.	Survey questions should be **short, specific** and **directly related to the question you want answered**. Respondents should be able to quickly, and easily understand what you are asking them.
2.	Keep the language of the survey questions simple and use plain and simple wording. Avoid complex and lengthy questions and words that may be open to interpretation by the reader
3.	Ask **one survey question at a time**. Do not use compound questions, Do not ask 'What do you think of __ and ___ instead if both are important, ask separate questions. Simple effective surveys should not take a long time to answer, **around 10-15 minutes** is preferred.
4.	**Do not ask leading questions**. These questions that hint to the respondent that you want them to answer positively or negatively.
5.	If you are looking to quantify, or count responses. **Use close-ended questions.** These questions only allow the respondent to answer using a specific list of up to 5 answers.
6.	**Open-ended** questions are used when soliciting a more detailed answer from respondents such as their perception, 'why' they feel a certain way. But interpreting these responses is often hard to do in a quantitative way.

Effective Quantitative Questions adapted from TOWES Research Essentials

Workbook: Unit 2: Gathering Information, p. 18. Retrieved from
http://www.towes.com/media/43755/bvc%20mod%202%20unit%202%20july.16.p.pdf Retrieved on November 20, 2017

By being able to develop quality survey questions, here are some ways you can contribute to a social project:

- Survey creation to evaluate your project
- Project decision-making

Using the example, can you think of one more question to determine why the attendance decreased from the first to second activities? Describe the type of question used, by referring back to the table.

If you are interested in the last question about whether the content is serving the needs of your attendees you could add response options for likely job sectors of the attendees. For example:

Please select the area of work you are in:

- ☐ Social Services
- ☐ Law Enforcement
- ☐ Education
- ☐ Other

You will revisit these questioning techniques in the learning activity. But often a mix of quantitative information and qualitative information is desired for a full picture of a project evaluation, so now let's explore another type of information.

QUALITATIVE INFORMATION

Now let's suppose you find some interesting numbers that give you cues toward a question you want more detail on. For example, you find a lot of your attendees have chosen other. How do you find out what that means? Or you might want more detail on why the event content was not relevant. Let the participant fill out what other means. You can follow this up with a less restrictive question.

Often you might want to get the input of key people involved in your project. A key strategy is interviewing these people to provide the added detail, perceptions, insights and beliefs. If, for example, your "counting" has shown that participation in your program has dwindled over the last two months; you may want to interview both participants who have stopped attending, as well as those who continued to attend – to explore the issue of attendance in more depth. One way of finding this out is through an interview.

Social Innovators on the Ground Say

" I would like to have gotten more people's feedback even if it meant you sit down and call everybody and just do the interviews over the phone that might have been helpful."

Developing Effective Interview Questions

A key strategy for this is to develop interview questions that you may like to ask. But what is the difference between Quantitative questions (usually in a survey) and Qualitative questions (usually in an interview)? There are similar, but unique concerns for each type of information.

Closed-ended questions only allow a restricted set of responses (such as Yes or No – Y/N), but not opportunity to elaborate without further prompting. It is good practice to provide open-ended questions so that answers flow naturally from your interview participants. **Leading questions** are those that give the participant an idea of what you want them to say such as: Would you agree that homelessness is a big problem? Or: These days, technology can allow separate community organizations to community organizations to collaborate and share their experiences, doesn't it?

Just like quantitative information. It is important to ask the right qualitative questions and prepare beforehand.

STEP	DESCRIPTION
1.	**Plan your questions**. Outline your information goals and organize or group related questions together. Think about the order of questions. Do they naturally flow from one to the next?
2.	**Know your purpose**. Every question you ask should be related to your topic and should be helping to gather either facts or an opinion. Know what type of information you need to better understand the outcomes of your project.
3.	**Start with general questions end with specific ones**. Start with the broader big picture questions then gradually drill down to specific questions.
4.	**Ask about one thing at a time**. Make sure to write short and to the point questions, each question should cover a single point. If you want to know two different things, then it is better to ask two different questions.
5	**Ask essential questions**. Respect the participant's time if the question is not directly relevant or important to your research don't waste your time or the time of the respondent.
6	**Listen**. Don't interrupt. Make sure to carefully listen to the complete answer of the questions you ask. Remember the key to good questioning is the willingness to really listen to the answers. The whole purpose of the questions is to hear the information provided to you by the respondents.

Effective Qualitative Questions table adapted from TOWES Research Essentials

Workbook: Unit 2: Gathering Information, p. 20. Retrieved from
http://www.towes.com/media/43755/bvc%20mod%202%20unit%202%20july.16.p.pdf Retrieved on November 20, 2017.

Given the example of event attendance, what question might you ask to get a participant's satisfaction, or perception of the activities?

Learning Activity 2.4: Effective Evaluation Questions Technique

Directions

1. Review the tables below
2. Practice developing effective questions in the different types by working through the questions that follow.

QUANTITATIVE QUESTIONS TECHNIQUE	
Step	**Description**
1.	Survey questions should be **short, specific** and **directly related to the question you want answered**. Respondents should be able to quickly, and easily understand what you are asking them.
2.	Keep the language of the survey questions simple and use plain and simple wording. Avoid complex and lengthy questions and words that may be open to interpretation by the reader
3.	Ask **one survey question at a time**. Do not use compound questions, Do not ask 'What do you think of __ and ___ instead if both are important, ask separate questions. Simple effective surveys should not take a long time to answer, **around 10-15 minutes** is preferred.
4.	**Do not ask leading questions**. These questions that hint to the respondent that you want them to answer positively or negatively.
5.	If you are looking to quantify, or count responses. Use **close-ended questions.** These questions only allow the respondent to answer using a specific list of up to 5 answers.
6.	**Open-ended** questions are used when soliciting a more detailed answer from respondents such as their perception, 'why' they feel a certain way. But interpreting these responses is often hard to do in a quantitative way.

Let's start thinking about gathering quantitative information in a simple survey. If you are helping to develop a survey you might run into these types of questions:

a. Did you attend event one?
b. Did you attend event two?
c. What about the event did you like?
d. Didn't you find the event helpful?
e. Would you recommend this event to friends or colleagues?

Think critically about the questions above:

1. If your goal is to determine numbers related to the event what question would you choose, and why?

2. Which question(s) are leading?

3. Which questions would you likely follow up with a qualitative techniques?

EFFECTIVE QUALITATIVE QUESTIONS TECHNIQUE	
Step	Description
1.	**Plan your questions**. Outline your information goals and organize or group related questions together. Think about the order of questions. Do they naturally flow from one to the next?
2.	**Know your purpose**. Every question you ask should be related to your topic and should be helping to gather either facts or an opinion. Know what type of information you need to better understand the outcomes of your project.
3.	**Start with general questions end with specific ones**. Start with the broader big picture questions then gradually drill down to specific questions.
4.	**Ask about one thing at a time**. Make sure to write short and to the point questions, each question should cover a single point. If you want to know two different things, then it is better to ask two different questions.
5.	**Ask essential questions**. Respect the participant's time if the question is not directly relevant or important to your research don't waste your time or the time of the respondent.
6.	**Listen**. Don't interrupt. Make sure to carefully listen to the complete answer of the questions you ask. Remember the key to good questioning is the willingness to really listen to the answers. The whole purpose of the questions is to hear the information provided to you by the respondents.

Turn the following into open-ended questions:

a. Did you like the event?

b. Did you find the application helpful?

c. Are you planning to continue with the project?
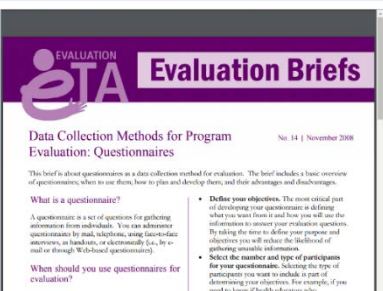
Questions for Consideration:

1. Thinking about the difference between open and closed questions which provides you with more information?

2. Why might it be important to ask both quantitative and qualitative questions?

As you can see there are many things to consider when evaluating a project, here we have strived to provide you with quality skills to evaluate a small social innovation project. In bigger projects there might be more to consider, but these basic skills will provide a framework for you to explore the information you need to make informed decisions about your project.

For more information on techniques for evaluation see the following in the supplemental resources section:

CDC Evaluation Brief Number 14: Questionnaires Retrieved from: https://www.cdc.gov/healthyyouth/evaluation/pdf/brief14.pdf Retrieved on: November 20, 2017.

The Centres for Disease Control (CDC) evaluation brief on questionnaires provides more information on planning a questionnaire or survey, and a more in-depth discussion of how to effectively administer a questionnaire.

CDC Evaluation Brief Number 15: Checklist to Evaluate the Quality of Questions Retrieved from: https://www.cdc.gov/healthyyouth/evaluation/pdf/brief15.pdf Retrieved on: November 20, 2017.

The Checklist of Effective Questions is a more advanced and detailed assessment of quantitative questions. Including how to troubleshoot problematic questions.
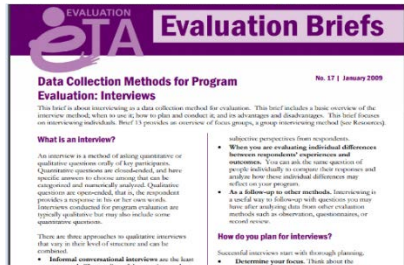
CDC Evaluation Brief Number 17: Checklist to Evaluate the Quality of Questions Retrieved from: https://www.cdc.gov/healthyyouth/evaluation/pdf/brief17.pdf Retrieved on: November 20, 2017.

The CDC evaluation brief for interviews will provide further information on how to develop and conduct an effective interview.

NESTA DIY Toolkit: Learning Loop Retrieved from: http://diytoolkit.org/tools/learning-loop/ Retrieved on: November 20, 2017.

The DIY Toolkit learning Loop provides a simple template for collecting insights and feedback, as well as tracking your established measures of success. This will provide a simple workflow for your evaluation cycle at various points in your social innovation project.

The Project Innovation provides advanced frameworks for conducting various evaluation and information gathering techniques in both quantitative and qualitative ways.

Topic Learning Checklist

Can you identify?
☐ How your project goals and planning are tied to your evaluation plans?
☐ The difference between quantitative and qualitative questions
☐ How to create effective quantitative questions?
☐ How to create effective qualitative questions ?
☐ When to use the two types of questions ?
☐ What pitfalls to avoid when creating the two types of questions ?

Recommended Performance Evaluation 1: Unit Reflection

Directions

1. Revisit the Learning Checklists for each topic and complete the following questions:

a. Topic One: Defining SMART Project Goals

Think about the SMART Goals you created for the examples, or your own innovation project. In your opinion which was the hardest letter to develop for your goal. Which letter is the most useful in your opinion as you start developing a social innovation project?

b. Topic Two: Project Planning: The Devil is in the Details

Explain how your project plan, and the manageable tasks identified help you refine your SMART Goals

c. Topic Three: Evaluation Planning: How are We Doing?

Given what you have learned about evaluation. Why is it important to evaluate your project at the beginning middle and end? What is an example of a benefit and a challenge of keeping your project and its evaluation flexible?

Thinking Broadly

a. Can you identify how each topic in this unit is related to each other? How have the SMART project goals informed your evaluation and how have these two topics informed your project planning?

b. Thinking back to Unit One, how do you feel having a well-defined social problem helped or challenged you when developing your goals, evaluation and project plan?

Recommended Performance Evaluation 2: Discussion

Background Information

Now is the opportunity to discuss the things that you learned and found interesting from the unit. Please discuss with your classmates in the discussion forum. If you are learning elsewhere you can discuss what you have thought about with a friend, mentor, or colleague.

Directions

1. Make a post in the Unit Two discussion forum that includes answers to:
   a. If you were asked to recommend one of the planning techniques you learned in this unit for a future or current social project, which would you be most likely to recommend? Why?
   b. If you were asked to recommend one of the planning techniques for your daily work, which would you likely recommend.
   c. Are your answers different? If so, why do you think that is? If not, why not?
2. Engage with your classmates, friends, or colleagues around your answers. Engage in discussion with others whose viewpoints may be different than your own

CONGRATULATIONS!

You have finished Unit Two. Please proceed to Unit Three.

Supplementary Resources

Social Innovation on the Ground: Accessible and Evidence Based Tools for Social Innovators

Topic Two: Project Planning: The Devil is in the Details

> NESTA DIY Toolkit: Innovation Flowchart Retrieved from: http://diytoolkit.org/tools/innovation-flowchart-2/ Retrieved on: November 20, 2017.

> NESTA DIY Toolkit: Theory of Change Retrieved from: http://diytoolkit.org/tools/theory-of-change/ Retrieved on: November 20, 2017.

Topic Three: Evaluation Planning: How are We Doing?

> CDC Evaluation Brief Number 14: Questionnaires Retrieved from: https://www.cdc.gov/healthyyouth/evaluation/pdf/brief14.pdf   Retrieved on: November 20, 2017.

> CDC Evaluation Brief Number 15: Checklist to Evaluate the Quality of Questions Retrieved from: https://www.cdc.gov/healthyyouth/evaluation/pdf/brief15.pdf   Retrieved on: November 20, 2017.

> CDC Evaluation Brief Number 17: Interviews: Retrieved from: https://www.cdc.gov/healthyyouth/evaluation/pdf/brief17.pdf Retrieved on: November 20, 2017.

> NESTA DIY Toolkit: Learning Loop Retrieved from: http://diytoolkit.org/tools/learning-loop/ Retrieved on: November 20, 2017

> Project Innovation: Methods & Skills Retrieved from: http://www.socialinnovationtoolkit.com/methods-skills.html Retrieved on: November 20, 2017

Note: While care was taken to provide supplementary materials that are all external links are not maintained by Bow Valley College and may become broken over time.

References

Adaptations:

Defining SMART Goals Technique

Bow Valley College (2015). TOWES Goal Planning Essentials

Workbook: Unit 1: The SMART Goal, p. 4. Retrieved from:
http://www.towes.com/media/43725/bvc%20mod%201%20unit%201%20july.16.p.pdf
Retrieved on: November 20, 2017

My Rich Uncle: Logic Model Technique

Barrington Research Group. Logic Model Worksheet for "My Rich Uncle" Exercise

Retrieved from: //fgdnk12.org/wordpress/wp-
content/uploads/2015/12/My_Rich_Uncle_Exercise_Barrington_Research_2015.pdf Retrieved
on: November 20, 2017

Evidence Planning Technique:

NESTA DIY Toolkit: Evidence Planning Worksheet Retrieved From:
http://diytoolkit.org/media/Evidence-Planning-A4.pdf Retrieved on: November 20, 2017.

Work Task Planning Technique: Simple Work Plan

Bow Valley College (2015). TOWES Goal Planning Essentials

Workbook: Unit 3: Creating a Work Plan, p. 22. Retrieved from:
http://www.towes.com/media/43737/bvc%20mod%201%20unit%203%20july.16.

p.pdf. Retrieved on: November 20, 2017.

Work Task Planning Technique: Detailed Work Plan

Bow Valley College (2015) TOWES Goal Planning Essentials Workbook: Unit 3: Creating a Work
Plan, p. 23. Retrieved from:
http://www.towes.com/media/43737/bvc%20mod%201%20unit%203%20july.16.p.pdf
Retrieved on November 20, 2017.

Quantitative Questioning Table

Bow Valley College (2015). TOWES Research Essentials

Workbook: Unit 2: Gathering Information, p. 18. Retrieved from:
http://www.towes.com/media/43755/bvc%20mod%202%20unit%202%20july.16.p.pdf
Retrieved on: November 20, 2017.

Qualitative Questioning Table

Bow Valley College (2015). TOWES Research Essentials

Workbook: Unit 2: Gathering Information, p. 18. Retrieved from:
http://www.towes.com/media/43755/bvc%20mod%202%20unit%202%20july.16.p.pdf
Retrieved on: November 20, 2017.