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*TRENDS, TOPICS & TIDBITS*

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## **To Measure or Not: Do We Have A Choice? Part 3**

In this, the third and final segment of the evaluation series, we look at the remaining three questions:

- Which methodologies should be used
- Who is going to collect the data
- What to do with the information once it is collected

### **Methodologies**

There are a variety of ways to collect the data necessary to evaluate the effectiveness of a program. These include:

- Surveys
- Focus groups
- Telephone calls
- Face to face interviews

The preferred methodology depends on the type of data required and the audience.

If you are interested in eliciting information from the senior management team, then one-on-one interviews are preferable. These executives are very busy and it would not be appropriate to send them an email survey. If an executive cannot be interviewed in person, then a phone interview is acceptable. Similarly, interviews are appropriate when speaking with community leaders, government officials and the like.

Focus groups and surveys are two ways to gather information from employees. The former includes far fewer participants, but enables the researcher to probe and understand employees' opinions on matters. A survey, in contrast, can include the entire employee base, but the researcher is restricted to a much smaller number of questions (10-15 is recommended). Furthermore, experience has demonstrated that respondents prefer to answer multiple choice or close-ended questions. Therefore, the focus group provides depth and the survey provides breadth. Ideally, it is best to conduct both types of methodologies. The

focus groups would follow the survey since they enable the researcher to explore ideas or issues that surfaced in the surveys.

## **Data Collection**

Although our research has shown that companies recognize the need to evaluate the impact of their programs, one of the biggest obstacles to doing so is a lack of time or skills or both. Assuming that the CI professional does not have time to conduct the evaluation, there are resources to help. Some of these include:

- Other departments in the company such as HR
- Academics
- Consultants
- Research institutes
- Interns

Many HR departments have staff who can help write and analyze a survey or conduct a focus group. The only caution is making sure that they understand the subject matter. Just because they have the requisite research skills does not insure that they will be able to craft appropriate survey questions or facilitate a focus group so you get the best responses possible.

If there is a local university or even college nearby, it would pay to tap the expertise of seniors or grad students who might love the opportunity to work on an evaluation project. For some, this might even serve as a thesis project. For the most part, this resource is usually very cost effective, but might require some supervision on the part of the CI professional.

Many consultants and research institutes have an expertise in evaluation and can be excellent sources to help conduct the assessment. Although they might be more costly than a graduate student, they have the expertise and require little, if any, supervision.

The key is selecting a resource that has the skills and knowledge to conduct a proper evaluation of the program, whether it is the overall CI program or a specific project funded by the company.

## **Tell the Story**

We like to think about data as telling a story. It is up to the CI professional to determine what that story is based on the data collected. Then, the right people have to read it. No one likes to read large reports, least of all senior executives. So it is important to decide which data are most important and to include them in a very precise and informative report.

Your report should be shared with both internal and external audiences. Your CI team and executives, certainly, need to be aware of the impact the company is making through its social investment. The nonprofit partner, too, needs to understand the results so it can use them to improve the program, obtain additional funders, and even share the story with the media. A compelling story of success is always the best end result of any measurement and evaluation project.