

# It's not only about the *how*: Asking the right questions to get better evaluation results

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#RethinkEval



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# Overview

1. **Some background**
2. **Introducing the discussion guide**
3. **Scenarios**
4. **Q & A**

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# Sector Driven Evaluation Strategy

- Many in the nonprofit sector feel like evaluation isn't working as well as it could (Funders have also told us this)
- Evaluation is a big systems issue
- Can be a huge asset when we get it right
- Most of the focus is on the *how* to and not enough is on the *why*



Sharing perspectives = Better evaluation.



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# What We Heard From Nonprofits

Inconsistent

Headache

Top-down

Misunderstood

Non-negotiable

Lack of Capacity

Last Minute

Not read

Proving the obvious

Spun

Focused on numbers

Inaccurate

Accountability

Uncoordinated

Under-funded

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# RESEARCH TELLS US THAT THE FOLLOWING SIX FACTORS ARE KEY TO A USEFUL EVALUATION:

A clear,  
shared  
purpose

Specific  
people committed  
to meaningful use of  
the evaluation

A plan  
for ongoing  
communication  
that ensures buy-in  
and transparency

Follow-through

A process to  
ensure that there  
is a safe space for  
critical reflection  
and learning

A match  
between  
expectations,  
skills/capacity,  
and funding

# Principles to Help Us Get to Useful Evaluation



## Reciprocal Respect



An evaluation that is treated as a partnership is more likely to lead to positive action.

### Includes evidence of:

An agreement on a clear, shared purpose

Accommodations for altering the evaluation approach when needed

Plain language

Creating a safe space for making mistakes and sharing honestly

Consideration of transparency, respect for privacy, and the risk of harm



## Commitment to Use & Learning



Evaluation should be concerned primarily with learning and action.

### Includes evidence of:

A clearly articulated plan for how an evaluation will be used and by whom

A plan for how and how often users will communicate

A discussion of how other stakeholders should be engaged noting that evaluation is most effective when those involved feel they have a voice

A design to ensure that this approach will lead to reflection, learning and helps to answer the key evaluation questions

A plan for reflection on the process itself noting that carrying out an evaluation (e.g., collecting data and asking questions) can have an effect on the community



## Matching the Why to the How



Good evaluation is not wedded to a single approach but employs a range of methods designed to maximize the chances of achieving the evaluation's intended use.

### Includes evidence of:

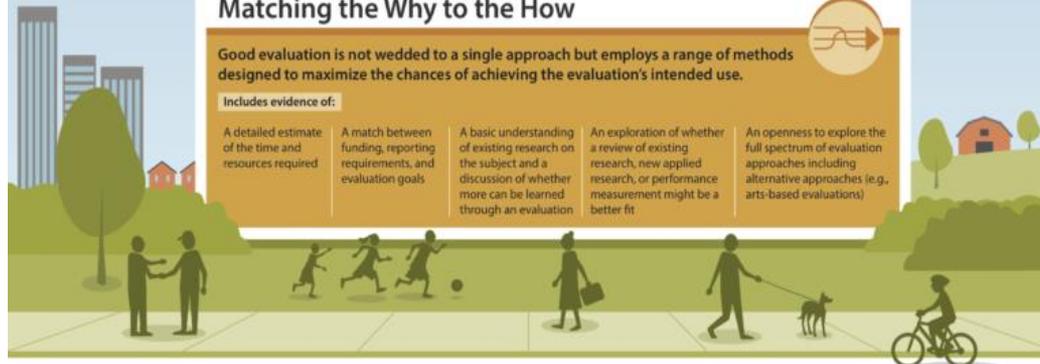
A detailed estimate of the time and resources required

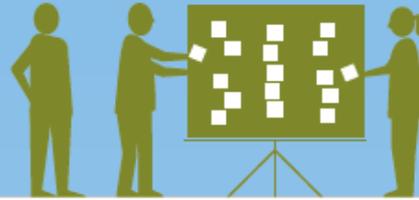
A match between funding, reporting requirements, and evaluation goals

A basic understanding of existing research on the subject and a discussion of whether more can be learned through an evaluation

An exploration of whether a review of existing research, new applied research, or performance measurement might be a better fit

An openness to explore the full spectrum of evaluation approaches including alternative approaches (e.g., arts-based evaluations)





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**LEARNING  
TOGETHER**

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**FIVE  
IMPORTANT  
DISCUSSION  
QUESTIONS**

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to make  
**EVALUATION  
USEFUL**

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**1**  
**What are we really trying to learn? How will this learning lead to action?**

**2**  
**How can we help each other learn?**

**3**  
**Is evaluation the right approach? If so, what kind?**

**4**  
**Who is going to do what?**

**5**  
**How will we communicate?**

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## QUESTION 1:

# What are we really trying to learn? How will this learning lead to action?

What this question means and why it matters for useful evaluation	<b>7</b>
How to ask it	<b>8</b>
When and where to ask it	<b>10</b>
Challenges that might come up	<b>10</b>

**Here are some suggestions for other questions to ask should you need further probes to get to the information you are looking for:**

How much input will I/we have into how the evaluation is designed? If I/we feel the methodology is too intrusive, for example, would I have an opportunity to get that method changed?

How and when will we communicate about this evaluation? Who should we call if we have questions?

What should we do if we face challenges (like low response rates)?

Could we arrange to meet half-way through to discuss preliminary results?

Could you come to one of the meetings of our evaluation or program advisory committee?

Would it be possible to arrange a meeting with other similar grant recipients to discuss our evaluation plans?

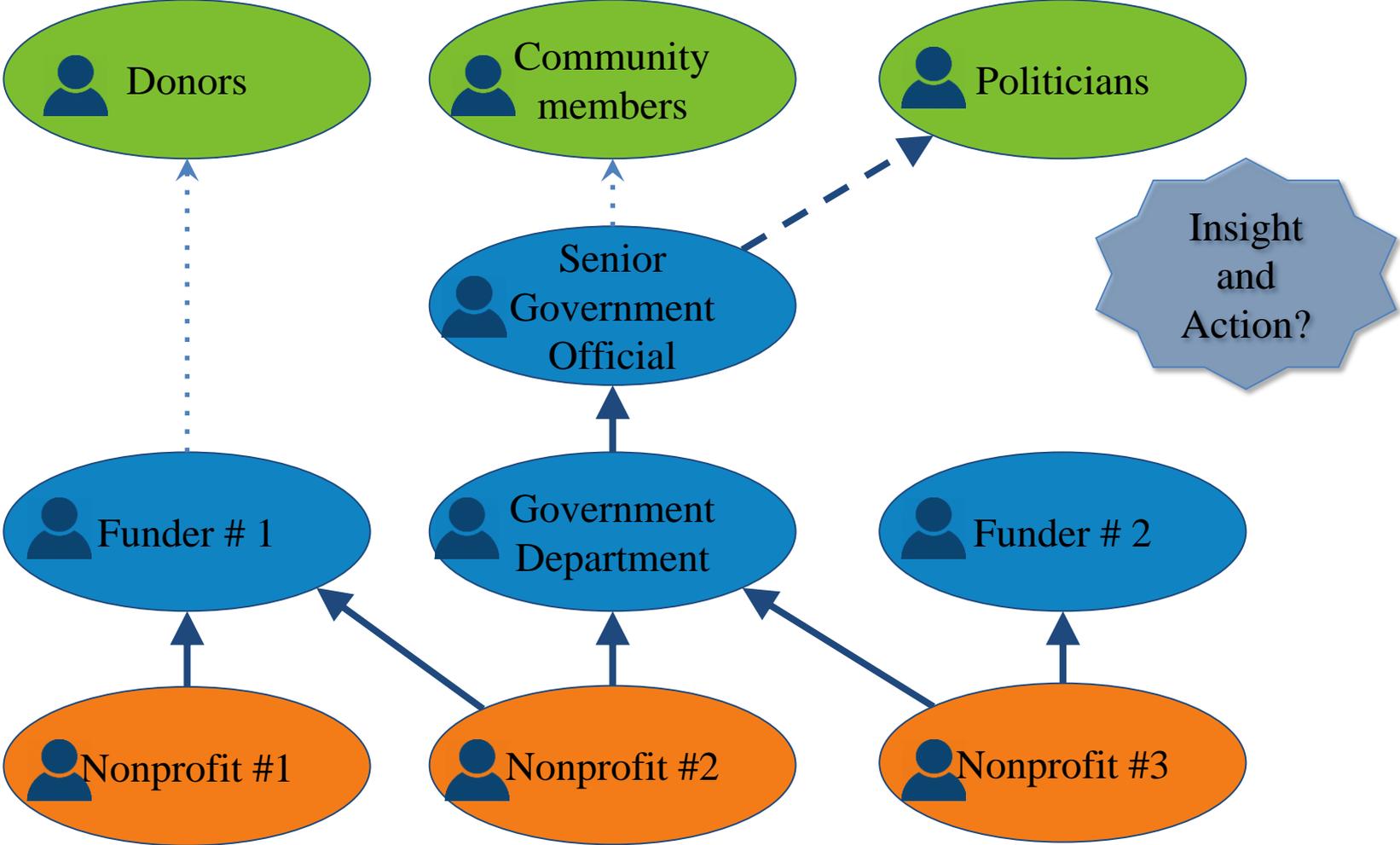
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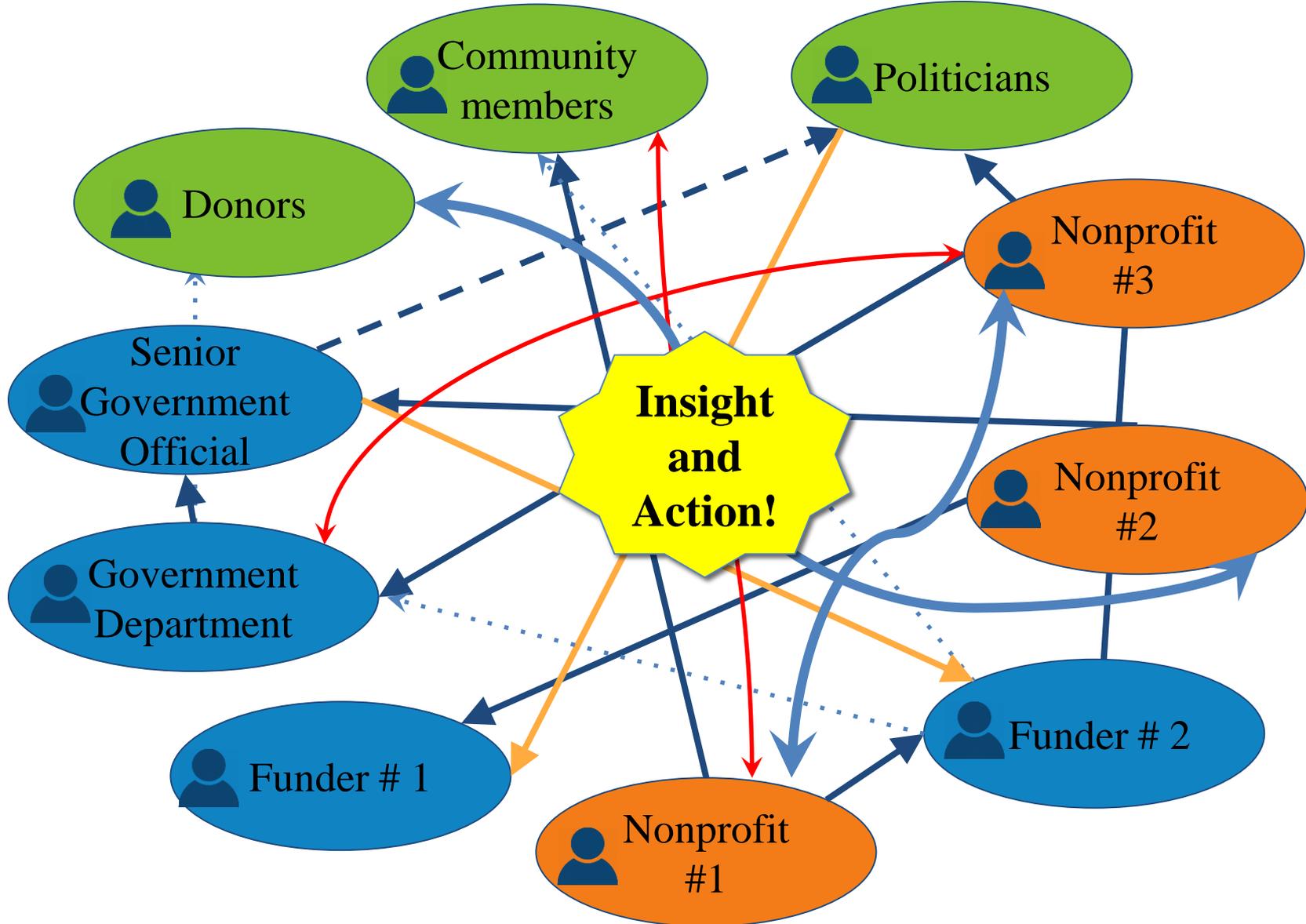
# How Does Evaluation Communication Flow in Funder-Mandated Evaluations?



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# Introducing the scenarios

1. We're going to work through three scenarios (one at a time) together.
2. Use the chat box to write in your questions or comments.
3. Feel free to use the [discussion guide](#) if you need suggestions.
4. We want this to be a safe space so we encourage you to make your answers realistic, but to also have fun.

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# Funder Information Session

During the presentation the funder explains that outcome measurement is going to be a key component of the process. Grant applications are to align with a list of priority outcomes and grant recipients will be expected to report on how they have measured their contributions to these outcomes.

**You feel these outcomes are good, but a bit ambitious and you aren't clear on exactly what kind of evaluation work you will be expected to do. You'd like to ask for clarification. At the same time, you don't want to give the funder the impression that your organization isn't supportive of the new direction.**

# Meeting with Your Board

You are an executive director with an interest in getting your organization to do more evaluation. **You think it will put your organization in a stronger position when applying for grants and you also think it will improve service.** However, your board of directors is cautious. They don't want the organization to take time away from providing service to clients, in order to "do paperwork."



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# 1:1 Meeting with a Potential Funder

You are interested in applying for a grant from a funder. You share their vision of combatting climate change, but are concerned by the requirement that all grant recipients pick one outcome from a list and focus their project on that. The outcomes on the list are all very concrete, but are also more long-term (e.g. an increase in the percentage of people who cycle or walk to and from work, the amount of greenhouse gases reduced, etc.). Your program is focused on building environmental awareness at a community level and is primarily about engagement.

**You have a great evaluation system in place and it works really well for you. However, it only focuses on the small steps that your organization is taking to help make your community more engaged on environmental issues (e.g. showing up to events, participating in discussions more frequently, etc.).**



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