

Developing a Sector Driven Evaluation Strategy

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With funding from the Ministry of Citizenship and Immigration

OUR
PEOPLE

OUR
FINANCING

OUR REGULATORY
ENVIRONMENT

About ONN

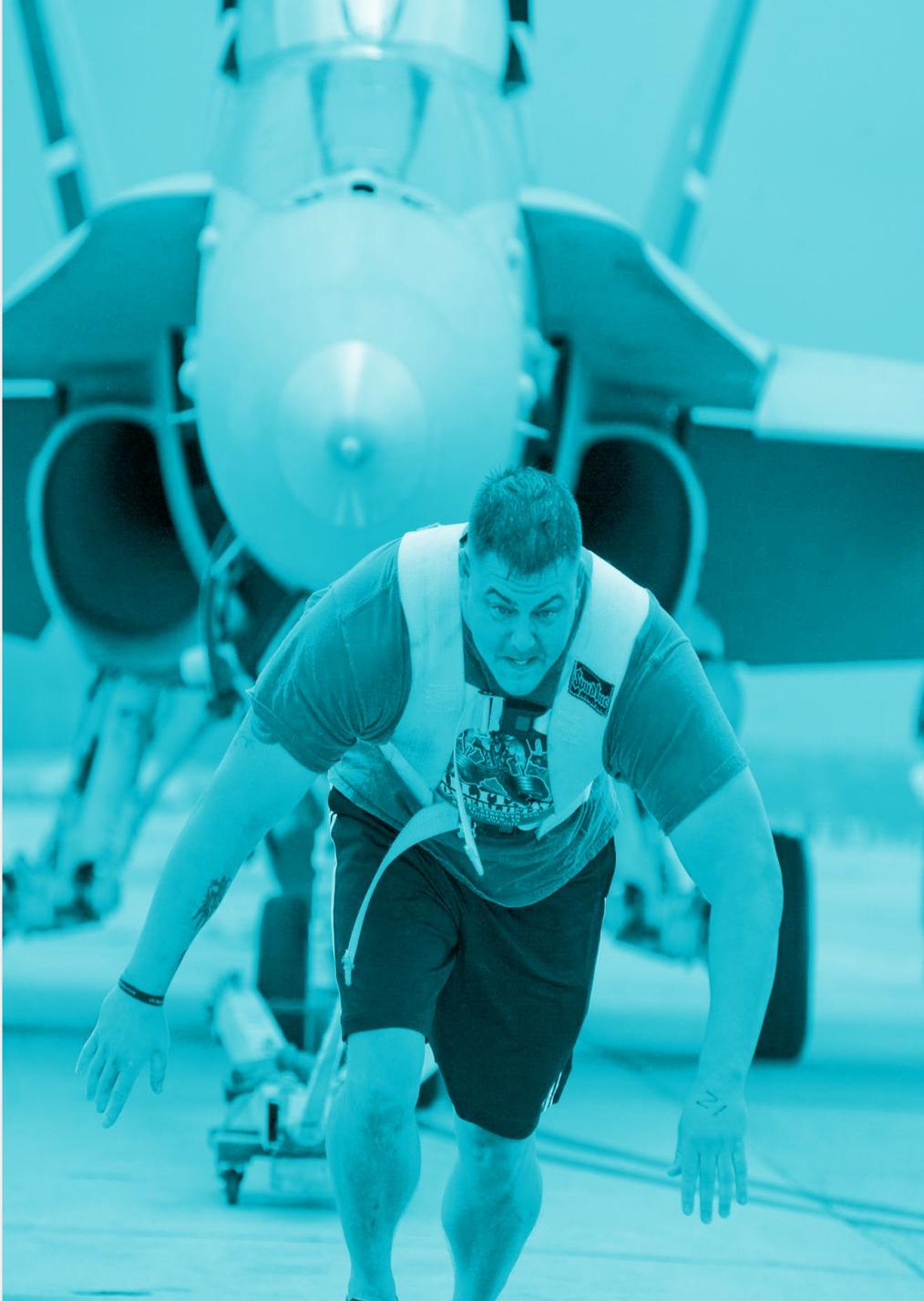
Our Mission: A strong and resilient nonprofit sector. Thriving communities. A dynamic province.

Our Vision: To engage, advocate and lead with – and for – nonprofit and charitable organizations that work for the public benefit in Ontario.

Our Values: Courage to take risks and do things differently. Diversity of perspectives, creativity and expertise to get stuff done. Optimism and determination. Solutions created by the sector, with the sector, for the sector. Celebrating our successes and learning from our experiences. Strength that comes from working together.

Working together toward

**A STRONG
AND
RESILIENT
NONPROFIT
SECTOR**



Ontario's Nonprofit Sector: Economic Driver

- > **55,000** organizations
- > Over **5 million** volunteers
- > **One million** workers
- > **\$50 billion** in economic impact (2.6% of GDP)
- *community nonprofits only*

Three priorities



Priority 1:

Advocate for an enabling public policy environment so nonprofits can thrive



Priority 2:

Champion the nonprofit sector's value and influence to strengthen its social and economic impact.



Priority 3:

Increase engagement and diversity of ONN's network to strengthen it and positively influence public policy.

Why A Sector Driven Evaluation Strategy?

Not working as well as it could.

Big systems issue.

Can be a huge asset when we get it right.

Focus on the *why* (not just the *how to*).



Sharing perspectives = Better evaluation

What this work is NOT about:



Another toolkit



Training

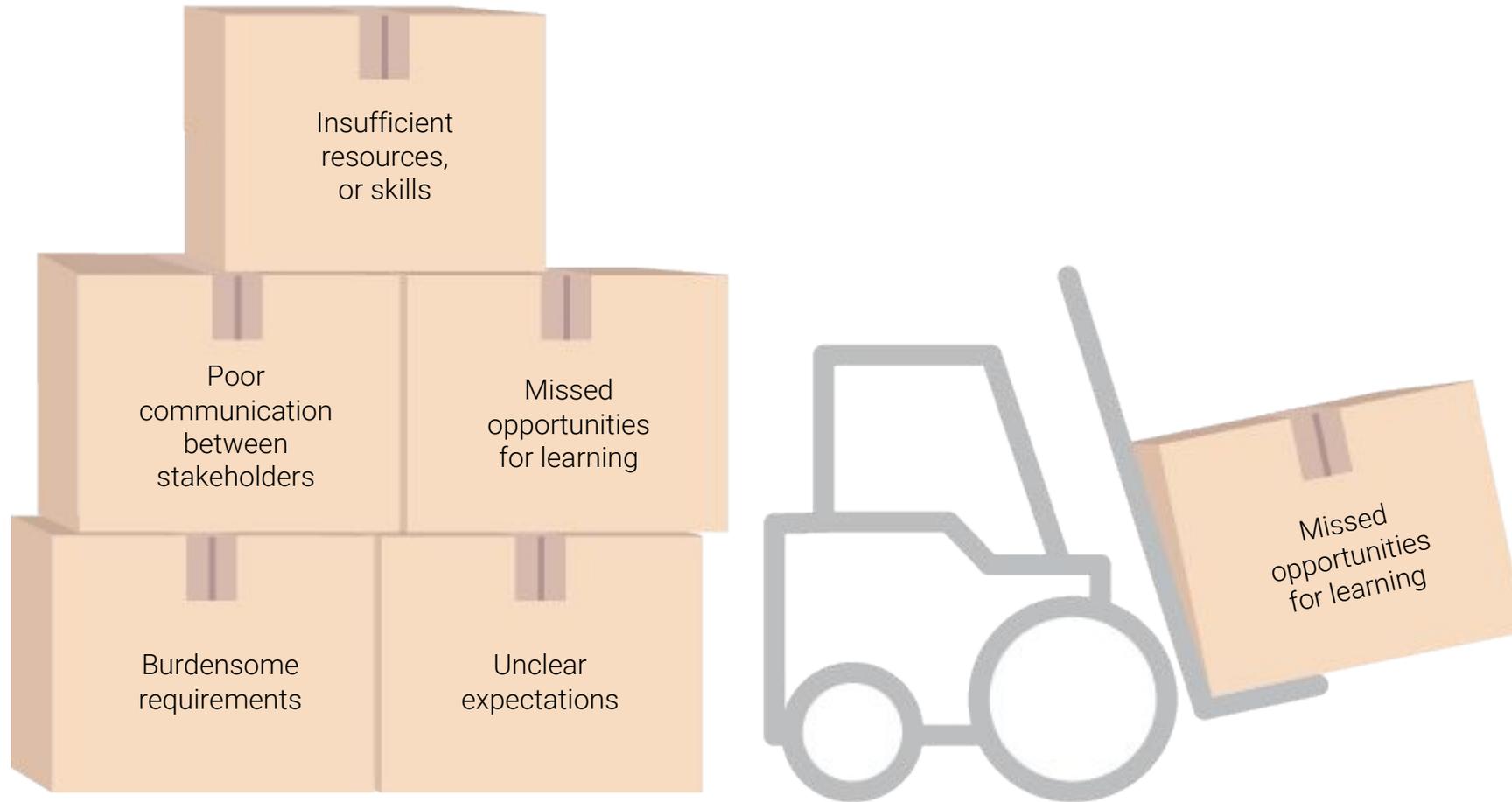


Methods/ Approaches



ONN Alone

Unpacking the systemic issues of nonprofit evaluation



Unpacking the systemic issues of nonprofit evaluation

5 REASONS WHY EVALUATION DOESN'T LEAD TO ACTION



Ineffective communication



Asking the wrong questions



Approach = expectations



Investment = expectations



Prioritizing accountability over learning

What we heard from Nonprofits

inconsistent headache

Top-down non-negotiable

misunderstood lack of

capacity last minute not

read proving the obvious

spun inaccurate focused

on numbers accountability

uncoordinated under-funded

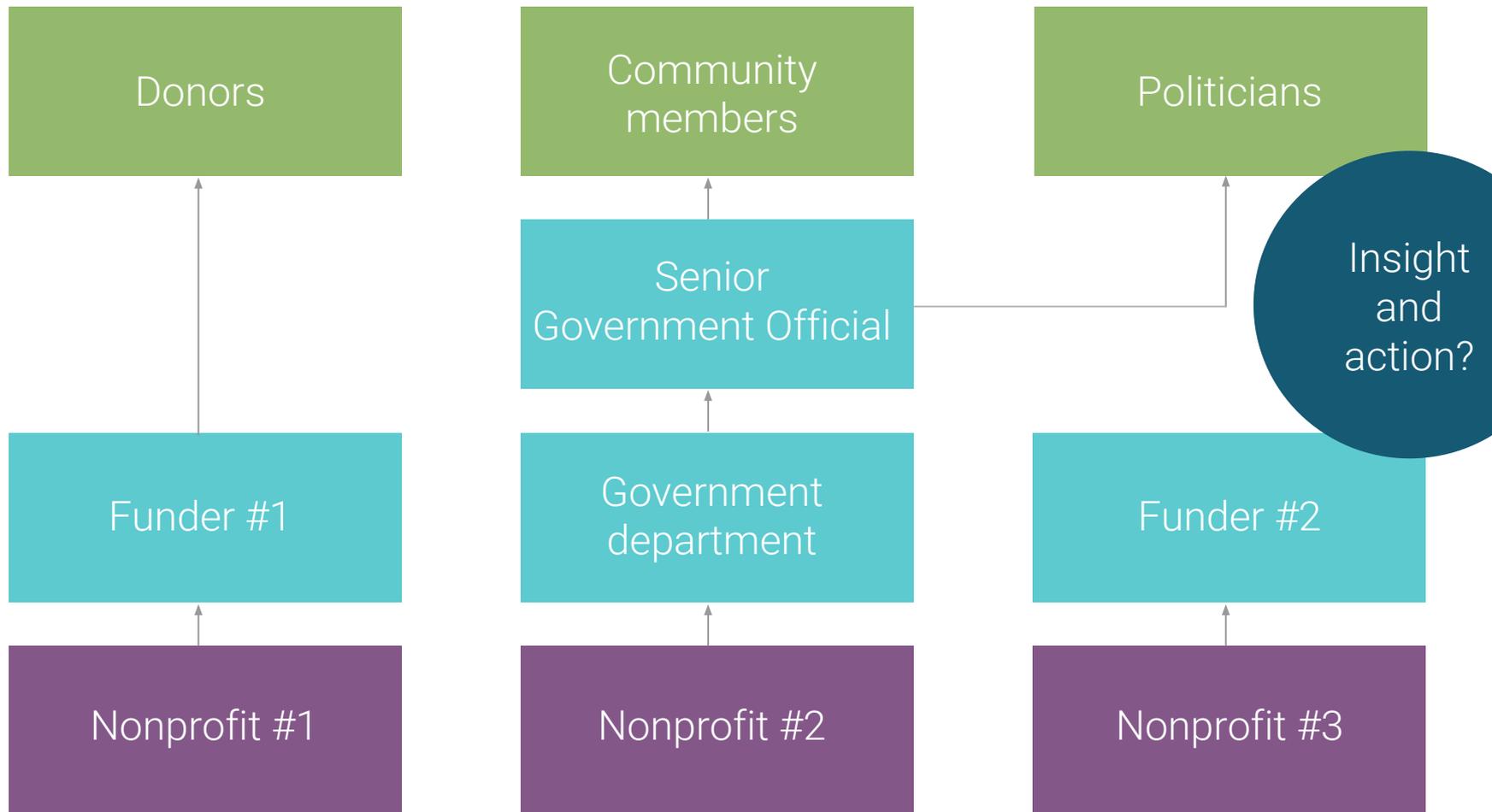


PAINT

B & S's
ORANGE
OASIS



How does evaluation communication flow in funder-mandated evaluations?



How should evaluation communication flow?



When evaluation is focused solely on accountability

Unclear expectations,
miscommunication
and frustration

↓
Missed
Opportunities



What does useful evaluation look like in a provincial government context?

Factors that promote use	You're probably on track when...	Not so good when...
A clear, shared purpose	<ul style="list-style-type: none"> > “This is one of the projects that is going to inform our new youth strategy next year. We hope to use it as a case study.” 	<ul style="list-style-type: none"> > “Evaluation is a requirement.”
Specific people committed to meaningful use	<ul style="list-style-type: none"> > “Let me introduce you to ___, from our strategic planning team. He’s keen to see what we learn here.” > “I’m not sure that format will resonate for our policy team.” 	<ul style="list-style-type: none"> > “We need to make sure we have it on file.”
Ongoing communication	<ul style="list-style-type: none"> > “I read over your interim report and I would love to know more about...” > “Here’s an interesting report from a project like yours.” 	<ul style="list-style-type: none"> > “That report is due on March 31st.” > “Timelines are tight.”

What does useful evaluation look like in a provincial government context?

Factors that promote use	You're probably on track when...	Not so good when...
Aligned expectations	<ul style="list-style-type: none">> “Going in, we all thought engagement with the school environment was going to be key, but we knew that would be tough to do. How’s it going?”	<ul style="list-style-type: none">> “Did your project reduce unemployment?”> “Can you send me some stats on (issue of the moment)?”
Space for mistakes	<ul style="list-style-type: none">> “That’s something we hadn’t considered. I’m going to share that with the team if it is ok with you.”	<ul style="list-style-type: none">> “Did your project reduce unemployment?”> “Can you send me some stats on (issue of the moment)?”
Follow through	<ul style="list-style-type: none">> “We’d love to have you attend the meeting where we are sharing the results.”> “Let me give you an update on which recommendations we have pursued.”	<ul style="list-style-type: none">> “Did your project reduce unemployment?”> “Can you send me some stats on (issue of the moment)?”

Why do evaluation in the nonprofit sector?



Learn about what works, under what conditions, and why



Build a stronger, more responsive nonprofit sector



Better address the societal issues that matter in Ontario

Building a nonprofit system that promotes useful evaluation: What more needs to be done?

Current Approaches

Building nonprofit capacity around the mechanics of evaluation

Designing outcomes-focused accountability systems

More evaluation taking place

More focus on outcomes-based planning

More data generated

Additional Approaches We are Exploring

Building a **shared vision** for evaluation in the nonprofit sector

Building capacity among nonprofits, funders & others to **negotiate evaluation plans**

Building capacity within nonprofit networks to **share what is learned**

Building a culture within nonprofits that **values critical reflection & sharing**, not just measurement

Strong shared understanding of why evaluation matters & how to make it useful

Evaluation answers important questions

Increased commitment to use of findings

Evaluation is more fun, less onerous

Increased trust & ownership

More action generated

More dialogue generated

Learn about what works, under what conditions, and why

Build a stronger, more responsive nonprofit sector

Better address the societal issues that matter in our communities

**LEARNING
TOGETHER**

**FIVE
IMPORTANT
DISCUSSION
QUESTIONS**

to make

**EVALUATION
USEFUL**



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?



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 **7**

How to ask it **8**

When and where to ask it **10**

Challenges that might come up **10**

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?

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

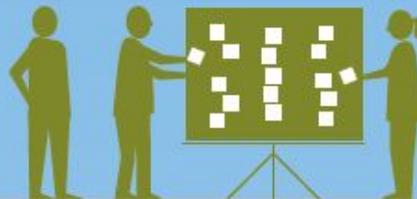
A match between funding, reporting requirements, and evaluation goals

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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Purposes or motivations for doing something called “evaluation”.	Approaches				
	 Facilitated Critical Reflection	 Performance Measurement	 Program Evaluation	 Systems Evaluation	 Applied Research
For an external agent, such as a government department, to determine whether local programs, sites or agencies have	 <p>Not a good fit. It can take time to build trust and create a safe space for critical reflection with grantees.</p>	 <p>Good fit... if data is used!</p>	 <p>Not a good fit. Evaluation methods are more complex than needed and the turnaround time for analysis may be too slow.</p>	 <p>Can work well... when time and energy are invested in shared performance measurement systems.</p>	 <p>Not a good fit. Applied research is not designed for day-to-day monitoring.</p>
For a nonprofit to determine whether individual programs or sites have delivered a service as planned.	 <p>Good fit! Sometimes a facilitated conversation with appropriate stakeholders about what works, what doesn't, and why is all that is needed.</p>			 <p>Not a good fit. Shared measurement tools aren't typically flexible or sensitive enough to track nuances of local programming.</p>	
For an external agent to determine whether local programs, sites, or agencies have achieved impact as planned.	 <p>Not a good fit. It is unlikely that this would allow enough time for an external agent who has not been involved in the day-to-day to determine the level of impact.</p>	 <p>Can work well... if performance measurement systems are sophisticated, specialized, and carefully monitored.</p>	 <p>Can work well... but evaluations undertaken for this purpose may not be as good at generating local insights or actions (see below).</p>	 <p>Can work well... when time and energy are invested in shared measurement systems, ongoing communication, backbone infrastructure, and a shared sense of purpose.</p>	 <p>Not a good fit. Applied research is not designed to inform action in a direct way.</p>
For nonprofits or networks of nonprofits to develop insights about their work and its impact leading them to improve practice.	 <p>Can work well... when combined with other approaches to distill lessons learned.</p>	 <p>Rarely works well. Measures are focused on outputs, buy-in is minimal, and analysis is basic.</p>	 <p>Good fit! Especially when time and energy is invested in buy-in, communication, clarity of purpose, and plans for use.</p>	 <p>Can work well... if local sites are engaged as partners in the process.</p>	
For networks representing a sector or the community as a whole to develop new knowledge about best practices and long-term impacts.	 <p>Not a good fit. This approach is unlikely to lead to the kinds of insight necessary to develop new knowledge.</p>	 <p>Rarely works on its own (although performance measurement methods are often useful when incorporated into more complex systems evaluation projects).</p>	 <p>Rarely works. Local evaluations do not typically measure long term change and are not designed to generate generalizable knowledge.</p>	 <p>Good fit! Especially when time and energy are invested in shared measurement systems, ongoing communication, backbone infrastructure, and a shared sense of purpose.</p>	 <p>Good fit! Especially when the research questions are highly focused and specialized.</p>
For large systems to develop insights about their work and its impact leading them to improve practice.			 <p>Rarely works. It is challenging to aggregate findings from different local evaluations.</p>		 <p>Can work well... if research findings are presented in an accessible way and provided in a timely manner.</p>

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



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