

Vision & Principles for Evaluation in Ontario's Nonprofit Sector

Preamble

The Ontario Nonprofit Network's (ONN) aim for a Sector Driven Evaluation Strategy is to create a more enabling ecosystem for evaluation in the nonprofit sector. We want a system¹ that makes it easier, more rewarding, and less stressful for nonprofits and their partners to do meaningful evaluation² work. By working in a collaborative spirit and embracing different perspectives that enhance the potential of what evaluation can and should be, we present our 2020 vision.

Our 2020 Vision for Nonprofit Evaluation

Evaluation Leads to Action More Often for More Purposes

By 2020, a much greater proportion of the evaluation work that takes place in Ontario's nonprofit sector gets used.

- Nonprofit organizations, government and funders in Ontario have a strong shared understanding of why evaluation matters and what makes it useful to all parties.
- Evaluation work will be used in a greater variety of ways. It will inform critical reflection and learning and engagement with community members.
- In the context of the nonprofit world, evaluation will be seen primarily as a tool for building an organizational culture that is responsive to community needs and focused on learning.
- Where evaluation is used for the purposes of accountability for funding, the intended uses of this evaluation work will be clear and meaningful.
- Fewer evaluation reports will sit on a shelf.

Evaluation Addresses Needs and Questions that are Important to a Range of Stakeholders

By 2020, evaluation work will answer questions that are seen as important and useful by nonprofits, community members, governments and others.

- There is an evolving, transparent, and active discussion on the sector's high level evaluation priorities: What are the issues, themes, or questions that evaluation work should address?
- Nonprofit organizations have the knowledge and resources to understand and conduct evaluation processes in ways that meet their unique needs at the right time.
- Governments, other funders and donors value good evaluation processes as an integral part of good program delivery and, as a result, are prepared to appropriately fund it.

¹ In this work, when we refer to "the system" we mean those factors that influence evaluation practice in important ways but are outside the control of most individual nonprofits. The system includes the policies and practices of government with respect to how evaluation work is funded, what questions or issues evaluation addresses, how evaluation findings factor into decisions about investment in programs and services, and how findings inform policy. The system also includes the actions of other funders in the nonprofit sector, including private foundations, corporate funders, and others. To some degree, provincial and national associations or umbrella groups, policy think tanks, regulatory bodies, academic researchers and evaluators also contribute to creating the systemic context within which nonprofit evaluation takes place.

² In this work, when we refer to *evaluation*, we use this term broadly to include performance measurement, evaluation of individual programs, and systems-level evaluation. We include internal evaluation work initiated and carried out by nonprofits themselves as well as projects that are initiated by funders or other external partners.

Evaluation is Planned, Conducted, and Shared in a More Collaborative Way

By 2020, evaluation work will be undertaken in a more collaborative way. Nonprofits will be much less likely to face the need to solve evaluation challenges on their own.

- Leaders within nonprofit organizations feel confident and have the capacity to effectively negotiate with funders and major donors the purpose of evaluation and the questions that are asked so that they are mutually beneficial. There will be fewer evaluation tasks that are imposed on nonprofits by governments or other funders.
- Nonprofit organizations and funders are openly sharing what they've learned from evaluation findings in a way that is helpful and thorough, leading to more evidence-based policy and strategic decisions.
- Nonprofit organizations, funders, provincial networks, evaluators and social researchers each understand their unique roles in evaluation clearly, and they work collaboratively on setting evaluation priorities, planning evaluation projects, carrying them out, and acting on the findings.
- Opportunities and forums are in place where communities, nonprofits, donors, and funders can freely share ideas and concerns about evaluation.
- Fewer evaluation projects (focusing on nonprofits and their programs) will be initiated unilaterally by funders.

Evaluation is Used When and Where It Can Help the Most

By 2020, evaluation work will occur only in conditions where it has a good chance of proving useful to stakeholders.

- Evaluation will be conducted in an ethical and rigorous way, as exemplified by the standards of the Canadian Evaluation Society.
- Evaluation will not be used in situations where other approaches, such as applied research or community engagement, are better suited to addressing the questions at hand.
- The practice of evaluation will be more methodologically diverse, in order to align better with a wider range of organizational types and cultural contexts.
- Evaluation projects will be resourced in a way that aligns with their purpose and methodology. Resources will not be invested in evaluation work that has limited potential for action.

The ongoing work

In 2020 and beyond, work will continue to:

- Build capacity and knowledge of evaluation to better understand and interpret existing and new methodologies and approaches for use in the nonprofit context.
- Create opportunities to facilitate engagement in and learning about evaluation across the nonprofit sector.
- Enhance evidence about community needs and assets, promising practices, and program impact, which can play a key role in high level planning for the nonprofit sector.

Principles to Help Us Get to Useful Evaluation

It should be noted that the Joint Committee on Standards for Educational Evaluation (JCSEE) has developed a set of program evaluation standards that have been adopted by the [Canadian Evaluation Society](#). The principles we have developed below in many ways echo the JCSEE list. However, our principles also aim to simplify and reframe the issues for a nonprofit audience and reflect many of the concerns we have heard from those in the sector.

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)

