With Special Thanks To ...

The Paul E. & Klare N. Reinhold Foundation

For their generous support of this program, part of the *Capacity Building for Clay County Nonprofits Series*

Events and Resources

- Clay CEO Confidential: February 9, 9 a.m.

- Stay tuned for more 2022 events!

- Please complete the evaluation at the end of the workshop

- Risk Management Resources: https://nonprofitctr.org/2021-clay-county-series-content-library/

Zoom Housekeeping

- Throughout the session, use the Chat feature at any time – you can chat privately to an individual (such as your host) or to Everyone.

- You can also rename yourself to make it easier for facilitators to identify you in the chat and during breakouts.
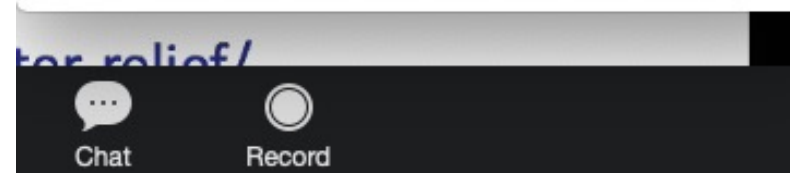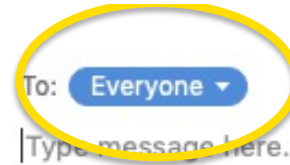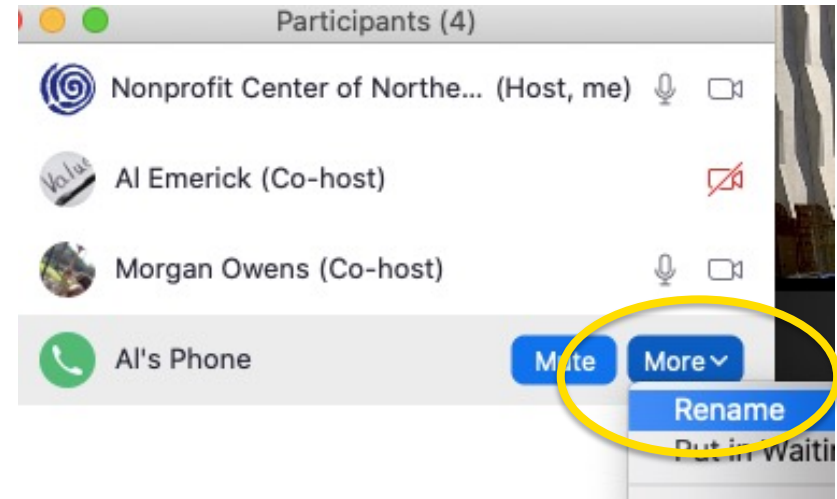
Zoom Housekeeping

- We are using closed captioning today! To turn on your closed captioning, click on the "Live Transcript" on your navigation bar and then select "Show Subtitle".

- We may use Breakout Rooms to give you a chance to talk directly to each other!

- Feel free to use other participant tools such as "Raise Hand."

- Check out our Zoom Guide at nonprofitctr.org/zoom-guide
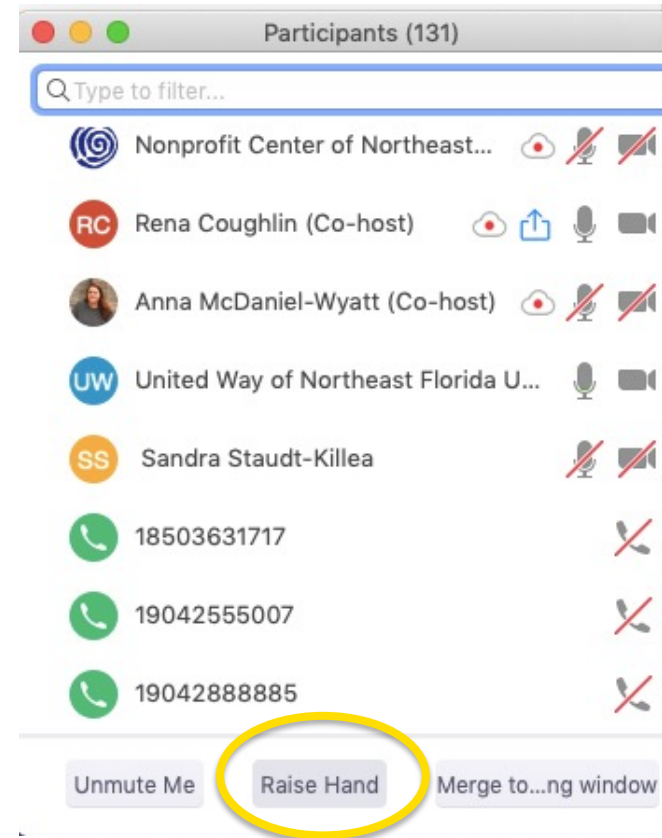
Nonprofit Center of Northeast Florida

The Nonprofit Center **connects**, **strengthens** and **advocates** for a strong nonprofit community.

- Nuggets e-news
- Workshops & Trainings
- Job Posting
- Resource library, website
- Advocacy & Lobbying
- 3 information platforms

- 300 Nonprofit Members
- Staff Consulting
- Peer Convening Groups
- Community Coaches
- Board Bank
- Research

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Welcome Today's Facilitator

Deirdre Conner
(She/her/hers)
Senior Director, Strategic Initiatives and Evaluation
Nonprofit Center

Introductions

- Name and organization

- Something you are grateful for (work or personal)

- The most-often used metric of performance *or* impact used by your program or organization

Choosing the Right Measures of Success

2021 Clay County Series
December 7, 2021

Workshop Sequence

✓ JULY 27: USING LOGIC MODELS

✓ SEPTEMBER 21: SURVEYING AND FEEDBACK

✓ TODAY: CHOOSING THE RIGHT MEASURES

Today's Objectives

- Understand how and why to measure your work, and the different types of data you might use to do so

- Develop measurable indicators of success based on the intended results of your organization's work, both for performance and impact

- Create a plan for measurement that is feasible for your organization's capacity

- Find resources to help you with your measurement plan

Program Lifecycle

Make Adjustments

Learn

Design

Share Data & Discuss

Use Existing Evidence

Evaluate

Monitor

Implement
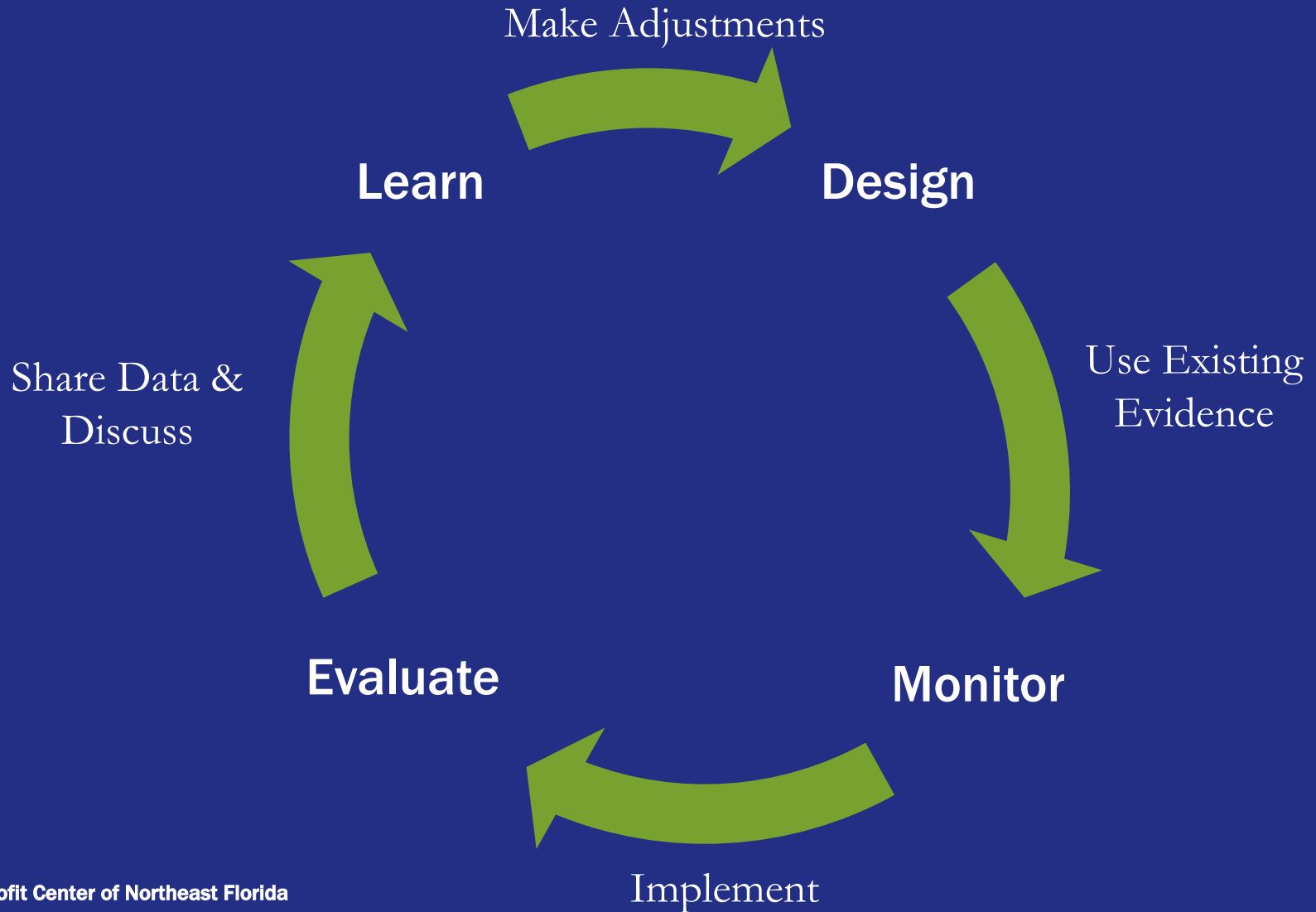
Why, and How, Do We Measure Our Work?

What Measurement Means for Nonprofits

Today's Agenda

- ~~Welcome, introductions, and overview~~

- Why Measure

- The Program Lifecycle

- The Learn-Design-Monitor-Evaluate framework

- Monitor: Measures of Performance

- Evaluate: Measures of Outcomes

- Developing a Measurement Plan

- Indicator Selection

- Next Steps and Resources

Nonprofit Center *Stronger Nonprofits Framework*
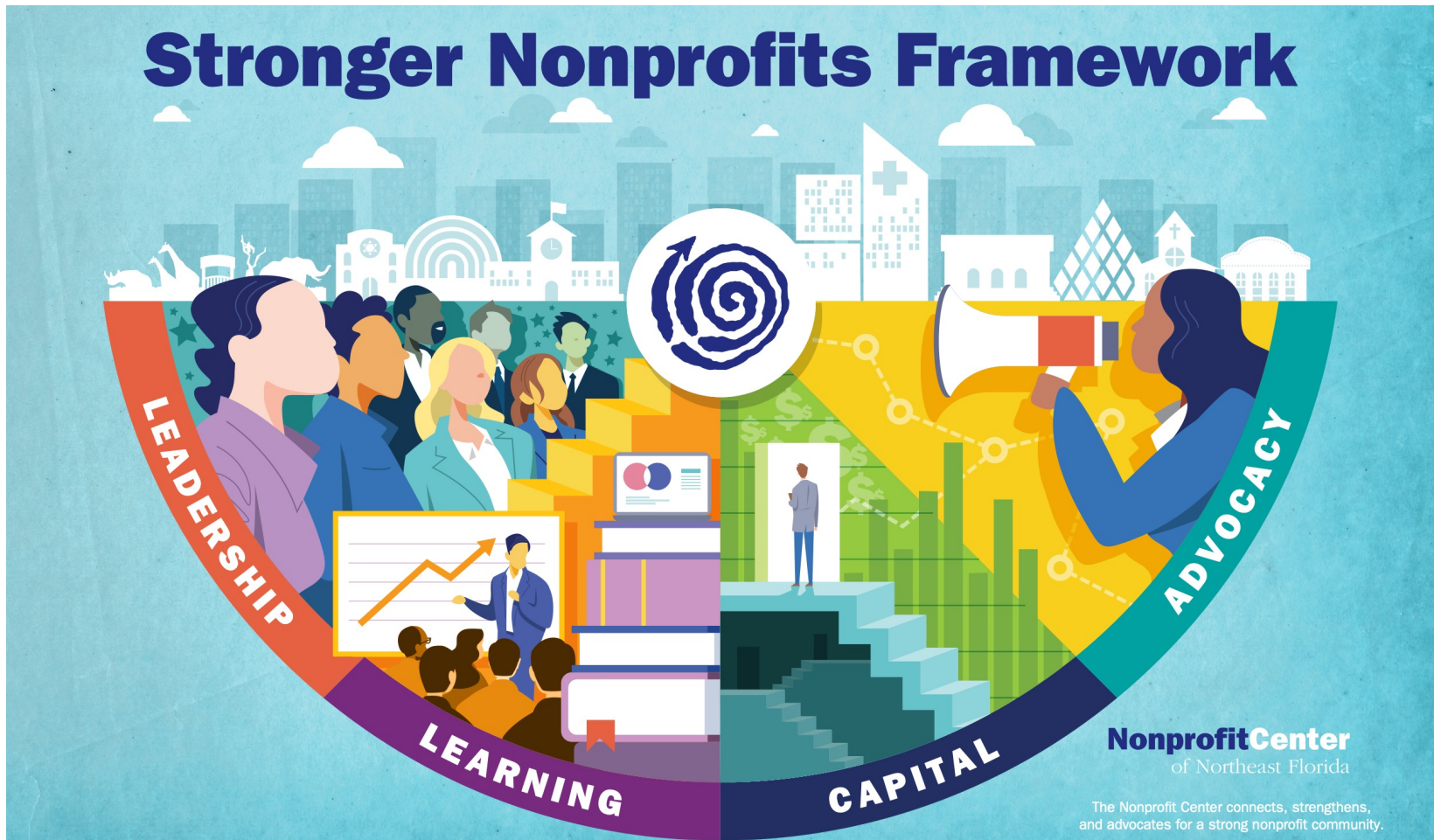
Organizational Learning & Measurement

Organizational culture that is open to, engages in, and promotes continuous learning for the purpose of improving performance and impact.

- An evidence-based mission strategy and a plan to execute it

- Measures of performance, outcomes, and impact

- Culture of continuous improvement, and the curiosity, capacity, and courage to measure the work and apply the knowledge gained to decision-making

Why It Matters

- Get closer to meeting the mission

- A supportive organizational culture exists

- Management requires evaluation

- Evaluation is not primarily motivated by personal interest

- Evaluation is likely to reveal success

- Evaluations are designed in collaboration with stakeholders

Program Lifecycle

Make Adjustments

Learn

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Nonprofit Center of Northeast Florida
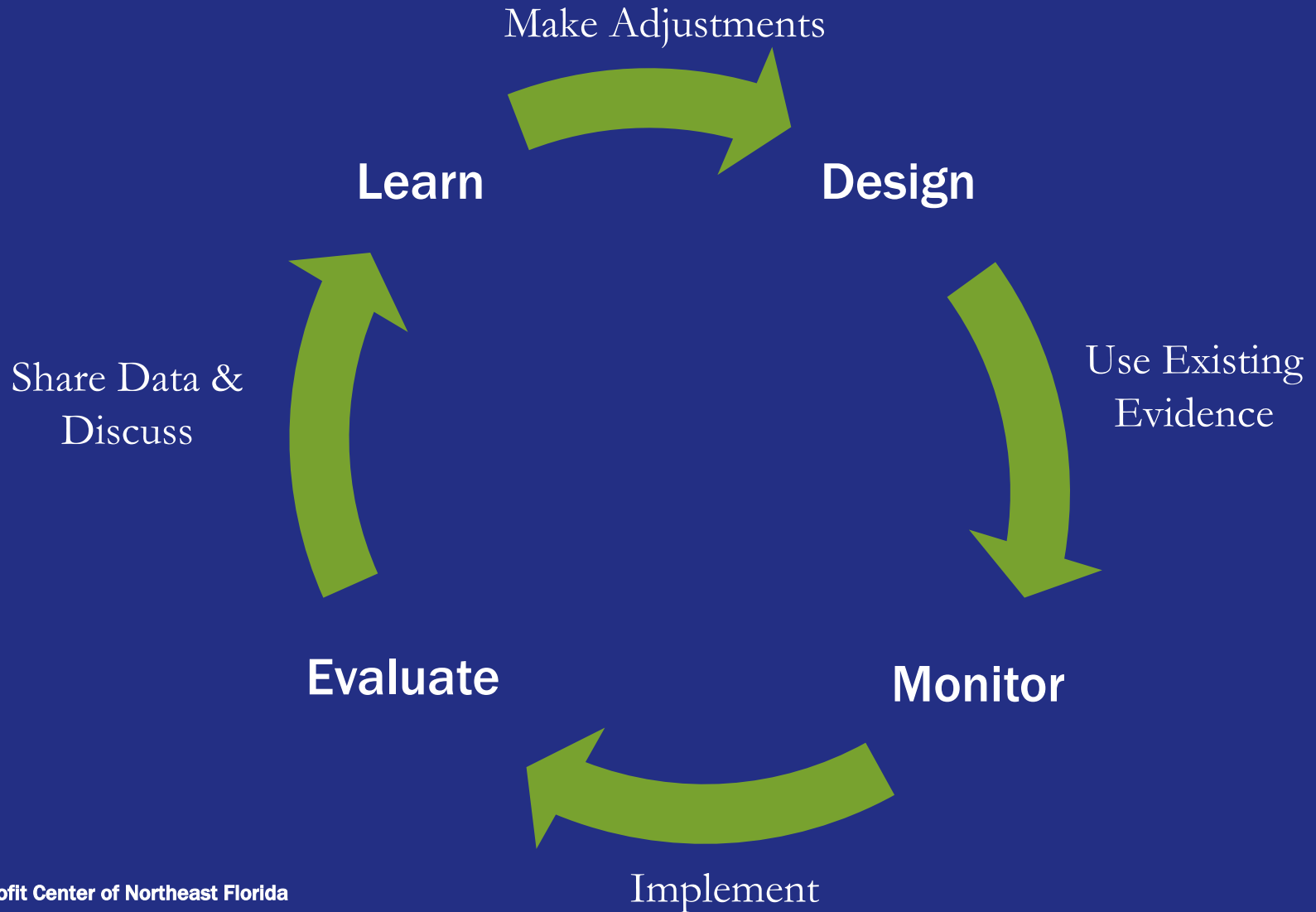
Program Lifecycle as a Framework

LEARN	DESIGN	MONITOR	EVALUATE
• Understand and foster your a culture of learning • Identify the problem and specify the solutions • Identify the counterfactual • Decide how results will be shared internally and with other stakeholders to identify opportunities	• Clarify underlying rationale and evidence for the program (ie – what are we doing what we are doing, and how do we know it will work? • Make adjustments to future programming based on past performance or other evidence • Plan program implementation and resource needs	• Track and measure implementation • Collect data and feedback • Report on indicators of performance and output	• Collaborate with stakeholders • Answer evaluation questions: • Mission impact • Public good impact • Report on indicators of outcomes • Process and present the data

What Could We Apply This Framework To?

- Single events

- Small programs

- Large programs

- Fundraising campaigns

- Comprehensive initiatives

- Local programs

- National programs

- Whole organizations

Your Monitoring & Evaluation Team

- Program managers

- Data managers

- Executive or other leadership

- Front-line staff

- Clients and constituents

- Other stakeholders?

CART Principles

Credible

Collect high quality data and analyze the data accurately

Actionable

Commit to act on the data you collect

Responsible

Ensure the benefits of data collection outweigh the costs

Transportable

Collect data that generate knowledge for other programs

Source: Innovations for Poverty Action

EVALUATE

MONITOR

Good Ideas x Effective Implementation = Social Impact

— Right Fit Evidence for the Social Sector

Starting with the End in Mind

LEARN	DESIGN
• Understand and foster your culture of learning • Identify the problem and specify the solutions • Identify the counterfactual • Decide how results will be shared internally and with other stakeholders to identify opportunities	• Clarify underlying rationale and evidence for the program (ie – what are we doing what we are doing, and how do we know it will work? • Make adjustments to future programming based on past performance or other evidence • Plan program implementation and resource needs

Closing the Loop: What It Looks Like

MONITOR

- Track and measure implementation
- Collect data and feedback
- Report on indicators of performance and output

EVALUATE

- Collaborate with stakeholders
- Answer evaluation questions:
  - Mission impact
  - Public good impact
- Report on indicators of outcomes
- Process and present the data

Local Nonprofit Approaches to M&E

Most commonly used practices by nonprofit organizations related to program evaluation

- Feedback forms, questionnaires, surveys (100%)
- Compiling statistics (88%)
- Completing grant reports (88%)
- Internal tracking forms (76%)
- Document review (71%)

Results are most often used to:

- Plan/revise programs (94%)
- Report to funder(s) on grants and contracts (88%)
- Communicate to stakeholders (88%)
- Develop proposals to funders (88%)

Evaluations typically seek to answer one or more of the following questions:

How much?
How well?
What difference did it make?

47% of respondents said **"How much?"** has been most important question to their program evaluation work

Monitoring vs Evaluation

MONITORING

- Is it being implemented as designed and having the intended usage?
- Tracking data for the purpose of comparison against a defined standard

EVALUATION

- What changed because of it? What difference did it make?
- Measuring efforts and outcomes and reflecting on results in order to learn and grow

M&E: Some Examples

MONITORING

- Did the afterschool program reach 300 students?
- Did a donor appeal go out on time, with compelling images, and to intended targets?
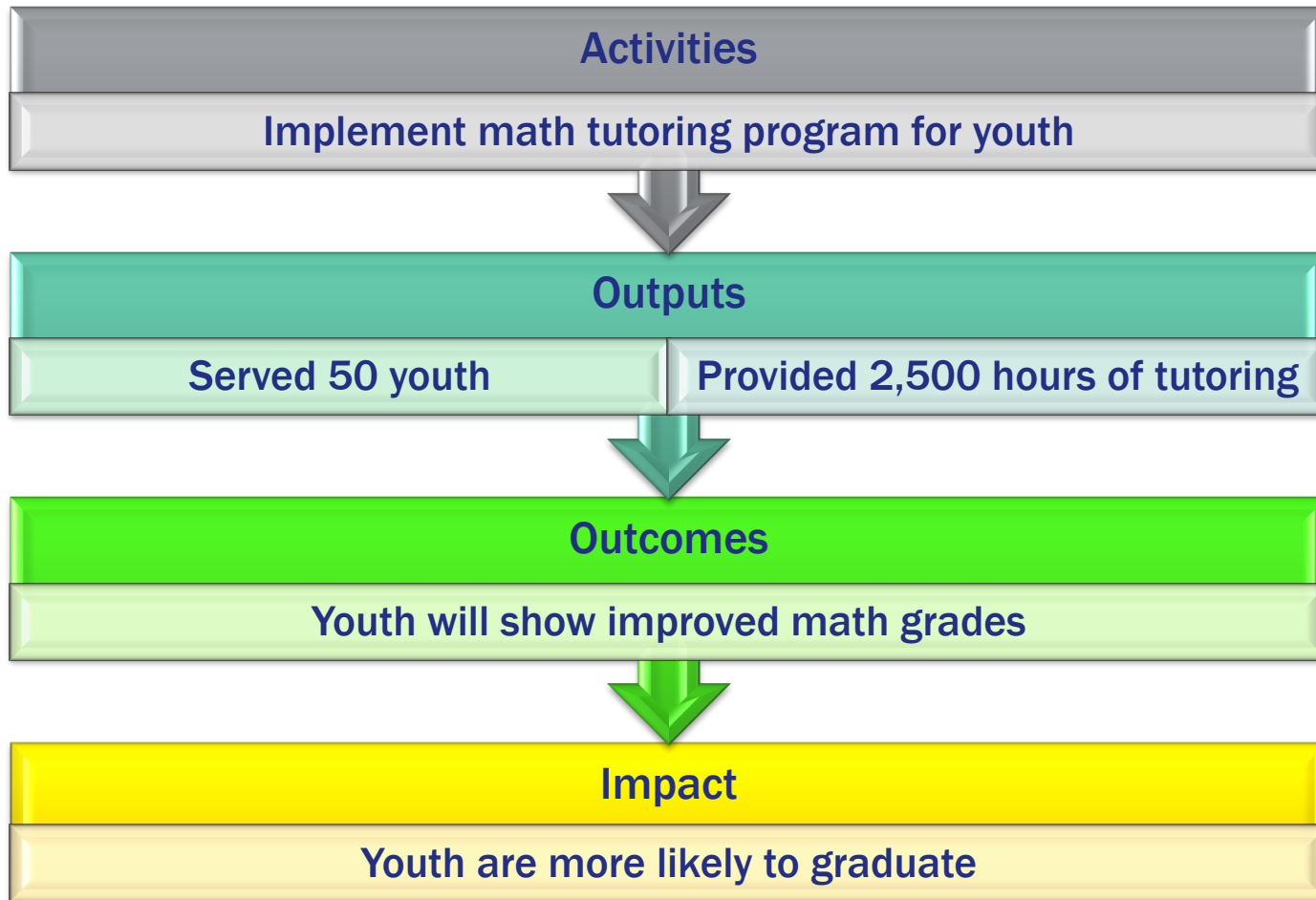
EVALUATION

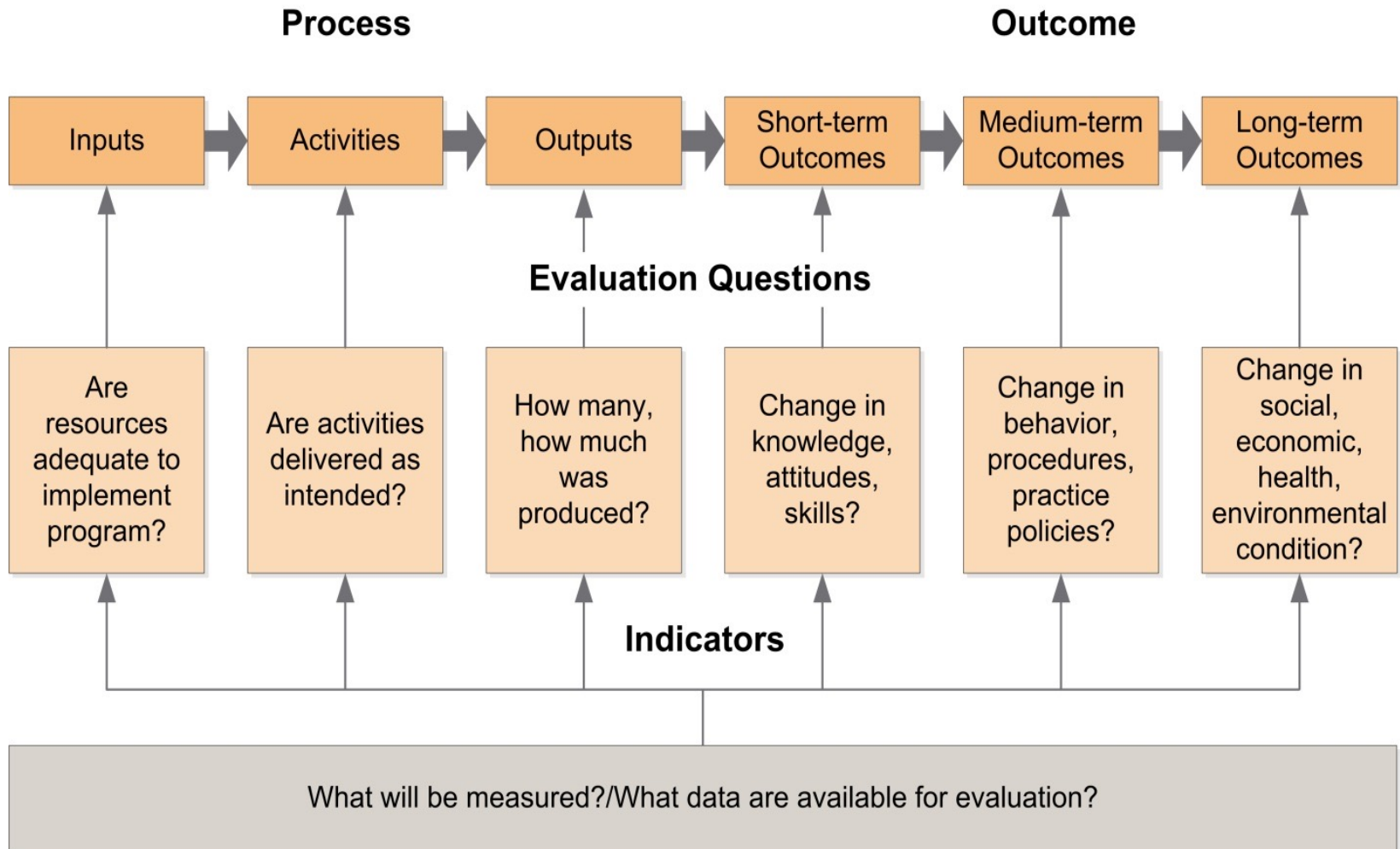- Were students in the program less likely to be suspended from school?
- How much money was raised from the appeal versus prior years?

Activities vs. Outputs vs. Outcomes

Activities

Implement math tutoring program for youth

Outputs

Served 50 youth | Provided 2,500 hours of tutoring

Outcomes

Youth will show improved math grades

Impact

Youth are more likely to graduate

Planning to Measure the Right Indicators

From Corporation for National & Community Service via www.nationalservice.gov/resources/evaluation/all-evaluation-resources

Simplified Example: Chewy's Chin Rescue

422 chinchillas taken in largest local rescue

Simplified Example: Chewy's Chin Rescue

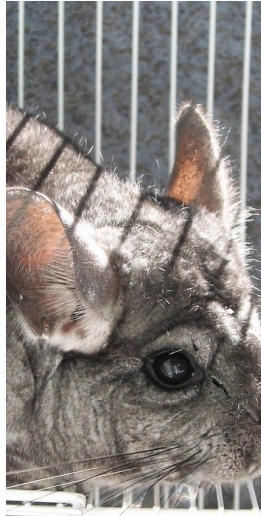| Sad Chinchillas ☹	Rescue Facility with Cages	Chin Ownership Education	Chins Find New Homes	Chins Are Safe and Cared For

A Problem	*An Input*	*An Activity*	*An Output*	*An Outcome*

Your Turn!

- **Pair** with a fellow participant and discuss …
  - What you will use as we run through today's training — the chinchilla rescue or your own program?
  - Data points you are already collecting or know you want to collect

- **Share** out with the larger group any conversation takeaways

Monitor

Developing Measures of Performance

Monitoring: Where the Rubber Meets the Road

Here's where we find out …

- If the work is being implemented correctly
- If the right people are participating
- What beneficiaries think about the program
- If we are collecting data appropriately
- If we are using data to inform future decisions
- If we have picked the right indicators of success
- And more!

Core Functions of Monitoring

Accountability & Transparency

- Did we do what we said we were going to do?

- External accountability vs. internal drivers

Learning & Improvement

- Impact on decision making

- Refinement for effectiveness

Performance Monitoring Data

Five types of data that every nonprofit should be tracking:

1. Financial Data
2. Activity Tracking Data
3. Targeting Data
4. Engagement Data
   - How extensive
   - How intensive
5. Feedback Data

Make Feedback Part of Monitoring

- Power dynamics can distort or even eliminate naturally occurring feedback loops

- Be more responsive to those you serve and build buy-in

- Learn about what is and is not working about your programs and use that information to drive improvement

- Ensure that programs are not adversely affecting participants

- Program evaluation or requirements from funders and nonprofit rating organizations

Your Turn!

- **Pair** with a fellow participant and share …
  - At least three things you want to measure that will help monitor program performance for your program or the chinchilla rescue

- **Share** out with the larger group any conversation takeaways

Evaluate

Developing Measures of Outcomes
and Impact

Outcomes

<u>What are they?</u>

- Observed changes that result from your program

<u>Two Types:</u>

- Short-term – what you see right away
- Long-term – link short-term to impact; often build on short-term.

Impact

What is it?

- The future social change you will create
  - **Mission impact**: social change at the participant or organizational level
  - **Public good impact**: social change at the community or systems level

Be sure that it:

- Focuses on 7-10 years down the road
- Improves conditions, increases capacity, changes policy, or has some other lasting effect
- Relates to your goal statement

Evaluating Impact

A few questions to ask ….

- How will I know what difference we are making?

- Is there a way to demonstrate what would happen without our intervention? (aka "the counterfactual")

- What is the right time horizon for an evaluation?

- Is this program a potential candidate for a randomized controlled trial?

- Is there existing evidence of effectiveness?

- Can I use indicators that are standard or being used by others?

Developing Your Evaluation

- **Identify Questions** first
  - How will you know if you are successful?
  - What do you want to know?

- **Measures/Indicators** second
  - What can you reasonably gather as evidence of your success?
  - What do you need to know to answer your questions?
  - How will you measure your results, practically?
  - Measures vs indicators

Evaluation: A Few More Questions

- How will I know what difference we are making?

- Is there a way to demonstrate what would happen without our intervention? (aka "the counterfactual")

- What is the right time horizon for outcome evaluation?

- Is this program a potential candidate for a randomized controlled trial?

- Is there existing evidence of effectiveness?

- Can I use indicators that are standard or being used by others?

- Is your program novel or innovative? Or does it adhere to existing evidence-based practice?

Evaluation: Equity Considerations

- Foundations of evaluation in nonprofit work

- Drives home the need to bring beneficiaries into the development and ownership of the work, and the evaluation of it

- Evaluation questions that address the effect of a strategy on different groups of people, and the structural and systemic conditions that surround the problem you are trying to solve

- Ensuring that DEI is embedded in your organization's culture and way of work makes it much more likely that your monitoring and evaluation work will be rigorous and useful

Researching Outcome & Impact Indicators

- Check out databases of indicators such as the UN Sustainable Development Goals, Urban Institute Outcome Indicators Project, or Guidestar Common Results Catalog

- Check out resources such as the Campbell Collaboration, or just search for your type of program and "systematic review"

- Connect with peer organizations and/or national associations

- Ask collaborators or funding partners what they or other orgs are using

- Refer back to your underlying rationale and Theory of Change

Evaluation: Sticking Points

- **We're stuck trying to figure out what to evaluate.**

  – Try asking your program participants! What difference did it make for them to be involved?

  – Try a Five Whys exercise to dig deeper around your underlying rationale and the root causes and/or problem you are trying to solve.

Evaluating Impact: Sticking Points

- **We're nervous that our evaluation will show that our work didn't make a difference.**
    - If your results are not as hoped for, look at it as an opportunity to …
        - Demonstrate courage and respect for the resources and participants
        - Look at your implementation: Was there a hang-up, an unforeseen event? Are there implementation examples nationally to look at? Do you need different — or more realistic — measures of success?
        - Look at your idea: What can you learn from results about adjustments needed to your program design? Is additional research needed?
        - Consider that your work may be having an impact that was not anticipated — keep your eyes open to possibilities.

Evaluating Impact: Sticking Points

- **We're having trouble identifying the right measures for our work.**
  - You're not alone: Try checking with nonprofits doing similar work to see what they are using. Feel free to reach out to the Nonprofit Center for suggestions!
  - Don't let perfection be the enemy of the good. Doing nothing is also a choice.

In Orgs Where Evaluation is Useful & Rigorous ...

❑ Evaluation is a priority

❑ A supportive organizational culture exists

❑ Management requires evaluation

❑ Evaluation is not primarily motivated by personal interest

❑ Evaluation is likely to reveal success

❑ Evaluations are designed in collaboration with stakeholders

Bottom line:

Intrinsically motivated evaluation > externally mandated evaluation

Sources:
Evaluation and Evaluative Rigor in the Nonprofit Sector. George E. Mitchell David Berlan. Nonprofit Management & Leadership (2016)
Why Aren't Evaluations Working and What to Do About It: A Framework for Negotiating Meaningful Evaluation in Nonprofits. Kellie C. Liket, Marta Rey-Garcia, and Karen E. H. Maas. Nonprofit Management & Leadership (2014)

Your Turn!

- **Pair** with a fellow participant and share …
  - <u>At least three</u> things you want to measure that will help measure program outcomes or impact for your program or the chinchilla rescue

- **Share** out with the larger group any conversation takeaways

Collecting Data

Ideas and Resources to Keep in MInd

"Measurement is a cost that can only be justified by its commensurate benefits."

- Paul Brest, *Stanford Law School and former president of the William and Flora Hewlett Foundation*

Methods of Data Collection

- Surveys

- Logs

- Observations

- Participant assessments

- Accessing existing data sets

- Focus groups/interviews

- And more!

Using Your Data & Learnings

- Looking for facts vs looking for trends and patterns

- Using data visualization tools

- Who inside your organization needs to see the results? How will it be shared?

- How will results be shared externally? With beneficiaries?

Data: Avoid These Common Pitfalls

- Not getting a large enough sample to represent your overall population

- Relying only on numbers — it's dehumanizing. Qualitative data add important context

- Collecting lots of data but rarely sharing or using it to make decisions

- Collecting data before asking what questions you want it to answer

➢ **Trying to track and measure too many things (or more than your organization's capacity will allow)**

If You're Feeling Scared …

- Balance respecting capacity with investing into necessary strategy

- Don't let perfect be the enemy of progress

- Empower staff to use these design tools on their own – can bring up important and unexpected discussions.

The Culture of Creating Your Plan

- Why is support and buy-in important to your program's success?

- Who are your stakeholders?

- How can you get their feedback?

Questions?

Upcoming Events

- **[Jessie Advocacy Series: What We Know – Changes in Vaccine Law](#)** – December 16

- **[Board Roles & Responsibilities](#)** – January 26

- **[Managing Successful Teams Series](#)** – Starts February 8

- **[Clay County Series: CEO Confidential](#)** – February 9

Stay tuned for more Clay Series programming in Spring 2022 including a Board Member Development Program!

For more information visit [nonprofitctr.org](#)

Resource List: Links and More

- **Schusterman Foundation Data Playbook**
https://www.schusterman.org/playbooks/data/
- **Feedback Labs**
https://feedbacklabs.org/guides/
- **SSIR Power of Feedback Series**
https://ssir.org/power_of_feedback
- **Pew Research Center Questionnaire Design Overview**
http://www.pewresearch.org/methodology/u-s-survey-research/questionnaire-design/
- **Community Tool Box Focus Group Guide**
https://ctb.ku.edu/en/table-of-contents/assessment/assessing-community-needs-and-resources/conduct-focus-groups/main
- **Learning with Constituents - Keystone Accountability**
https://keystoneaccountability.org/wp-content/uploads/files/3%20Learning%20with%20constituents_0.pdf

Resource List: Links and More

- Innovation Network

- Corporation for National and Community Service – Evaluation Resources and Training

- Leap of Reason Performance Practice

- Schusterman Foundation Data Playbook

- InfoActive Data + Design

- Feedback Labs

- Pew Research Center Questionnaire Design Overview

- W.K. Kellogg Foundation

- American Evaluation Association

Thank you!

Contact

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