

Evaluation: An Essential Tool for Strategic Learning

Peter York
Senior Vice President

Jared Raynor
Senior Consultant

TCC Group

October 19, 2010



strategies to achieve social impact

Overview of the Presentation

- 1. Why Learning Matters**
- 2. Strategic Learning**
- 3. Why Nonprofits Aren't Learning**
- 4. What Funders Can Do to Strengthen Learning**

Leadership: The Key to Everything

Sustainability

Lifecycle Advancement

Effectiveness

There's More to Leadership...

- Advancing effective communication of mission and vision to internal and external stakeholders
- Engaging internal and external stakeholders in planning
- Taking decisive action when faced with challenges
- Making decisions anchored in cost-effectiveness
- Demanding accountability that includes demonstrated success with those being served/targeted

Only one in four nonprofit organizations are well led...

The Key to Leading Is Learning

- *Creating sophisticated financial, operational, programmatic and environmental data-gathering and learning processes*
- *Conducting evaluation*
- *Infusing learning into ALL planning, anchored in program success*
- *Taking immediate and decisive action at a human resources level as indicated by evaluation findings*

Only one in four nonprofit organizations are effective learners...

Why Aren't Nonprofits Learning?

The Investment Model Is All Wrong

- There's **no** outcome synchronicity between the investor and investee
- Effectiveness and accountability **must be** viewed through the measurement of proximate effect
- Proximate cause-and-effect is the **only** way!
- Learning **requires** understanding the cause, **not** the effect
- There's **no** Research & Development for programs/initiatives

Why Doesn't Evaluation Lead to Learning?

A Field Recognized Definition for Evaluation

“The systematic collection of information about the activities, characteristics and outcomes of program use by specific people [by doing what?...in order] to reduce uncertainties, improve effectiveness and make decisions with regard to what those programs are doing and affecting.”

Michael Quinn Patton, “Evaluation Essentials for Small Private Foundations”

Or, a method for finding out what happened, how & why...

The Steps in An Evaluation

Seven Common Steps in Evaluation:

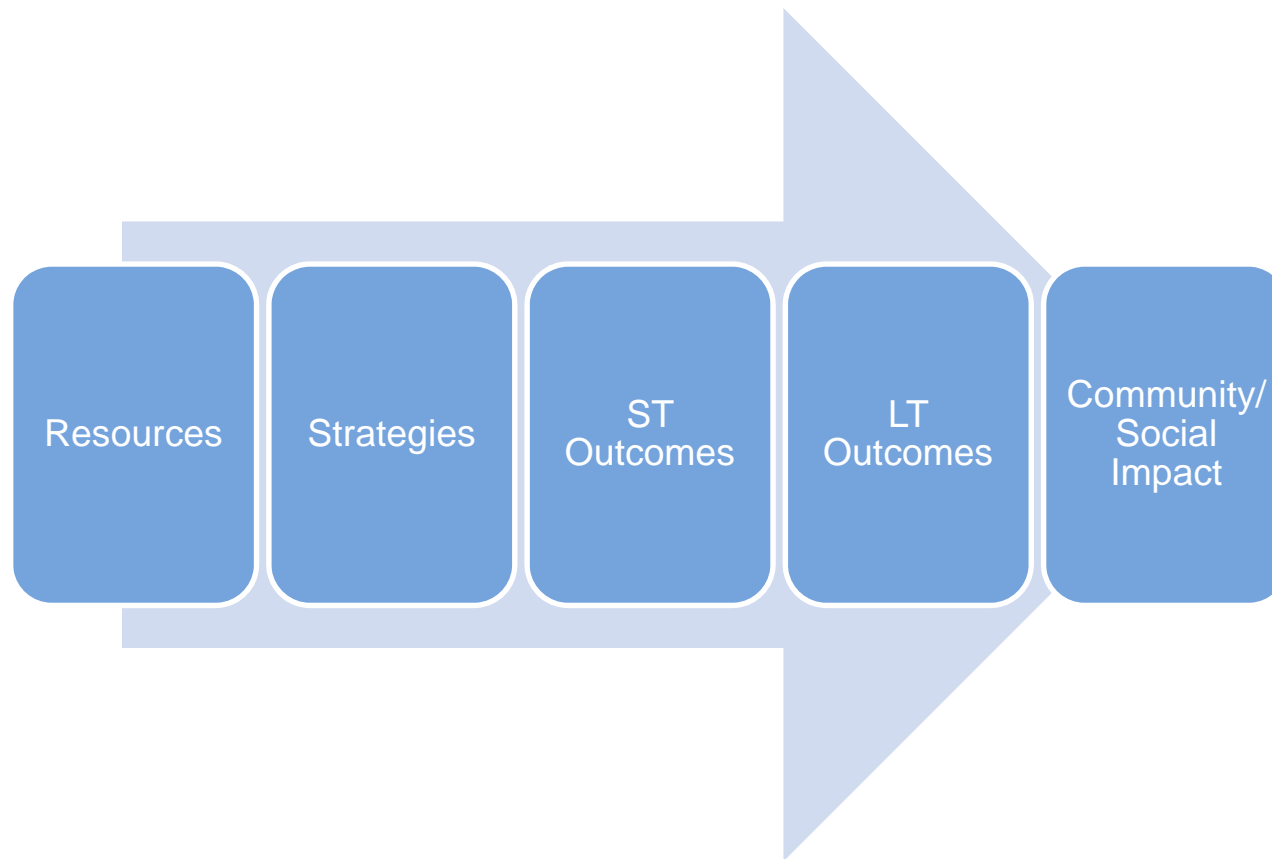
Minimal
Learning

1. Identifying and organizing the decision-makers
2. Determining who will conduct, participate in, and be the audience for the evaluation
3. Developing a *logic model*
4. Stating the *evaluation questions* and *indicators*
5. Developing the *evaluation workplan*, including the evaluation design, methods, tools, and tasks

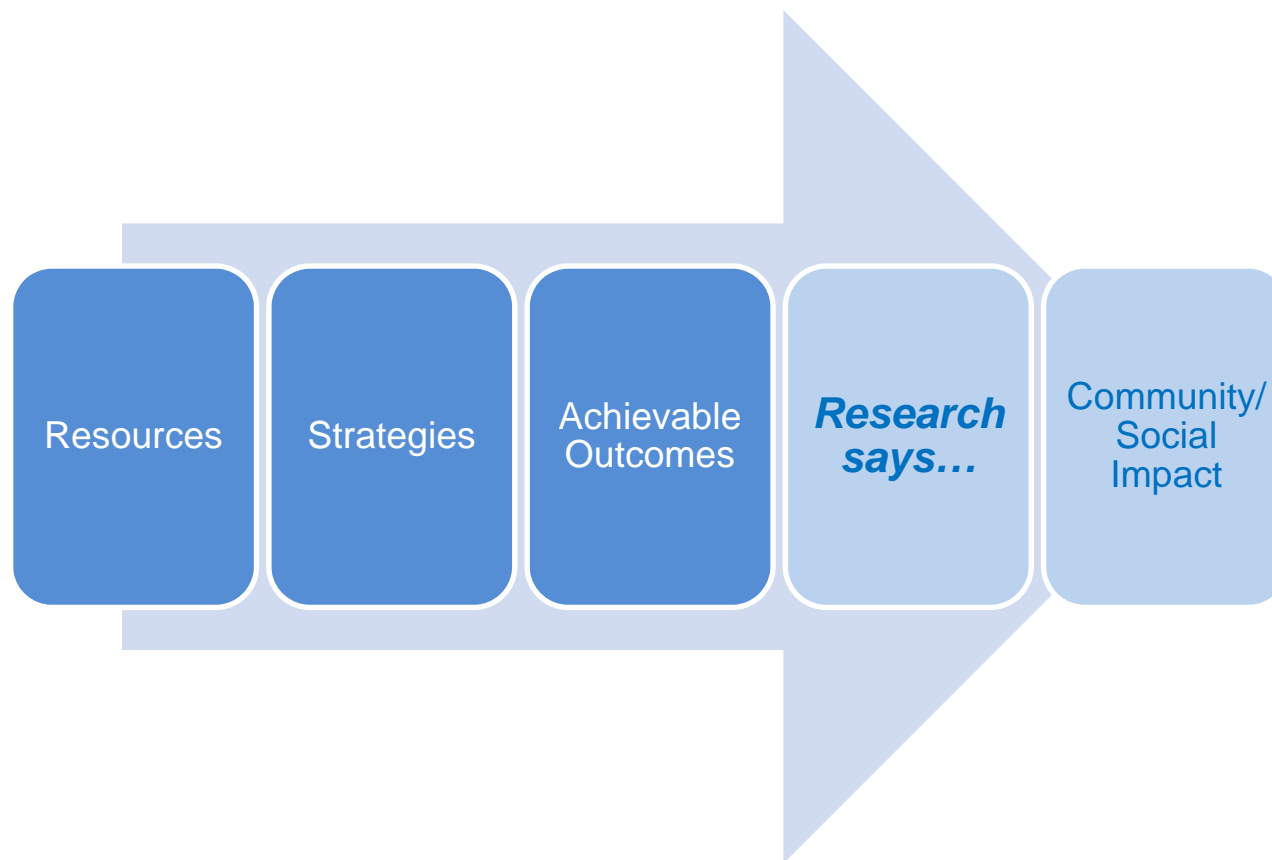
Where
Learning
Occurs

6. Gathering, analyzing, and interpreting the data
7. Using the evaluation findings

Evaluation: Using the Wrong Model



Evaluative Learning: Changing the Model



Shifting Evaluation to Learning

**Accountability
focused:**

Did it Work?

Accountability-based evaluation: evaluation efforts that answer one or more of the following questions:

- Did our program achieve the ultimate outcomes for the clients we serve?
- Did we implement the whole program as designed?
- Was the whole program effective enough to justify the cost in terms of money and level of effort?

**Learning
Focused:**

What Worked?

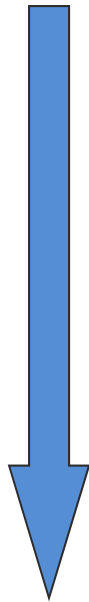
Evaluative learning: evaluation efforts that answer the following questions:

- What level of attainable client outcomes were achieved and how did specific groups of clients differ with respect to their level of outcome achievement?
- What specific program practices were most important to achieving the attainable outcomes, how do these program “best practices” differ for specific client groups, and why?
- Which specific program practices were so effective that when funding levels change they should be the last to go or the first to grow?

The Heart of the Matter
Determining Your “True” Outcomes

First, Uncover the “Real” Outcomes

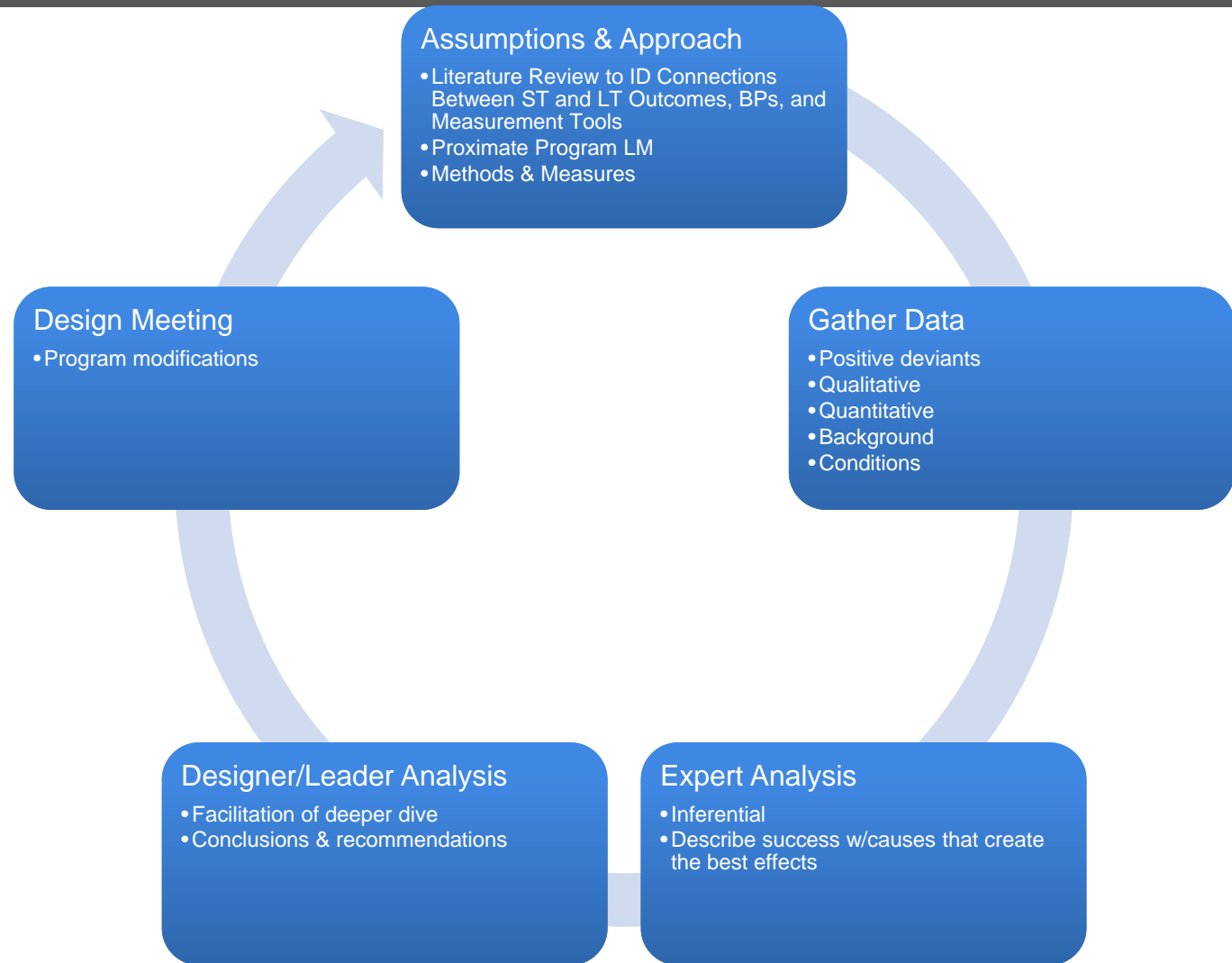
- It's all about the path to behavior change:



- Awareness
- Knowledge
- Attitude
- Motivation
- Skills
- Opportunity
- Behavior

The Ideal Learning Process

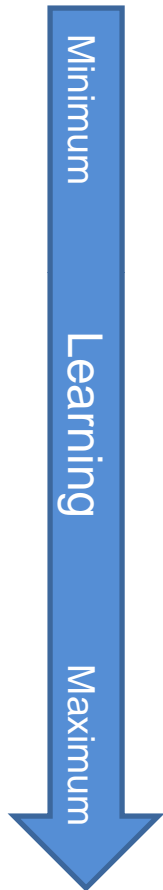
The Strategic Learning Process





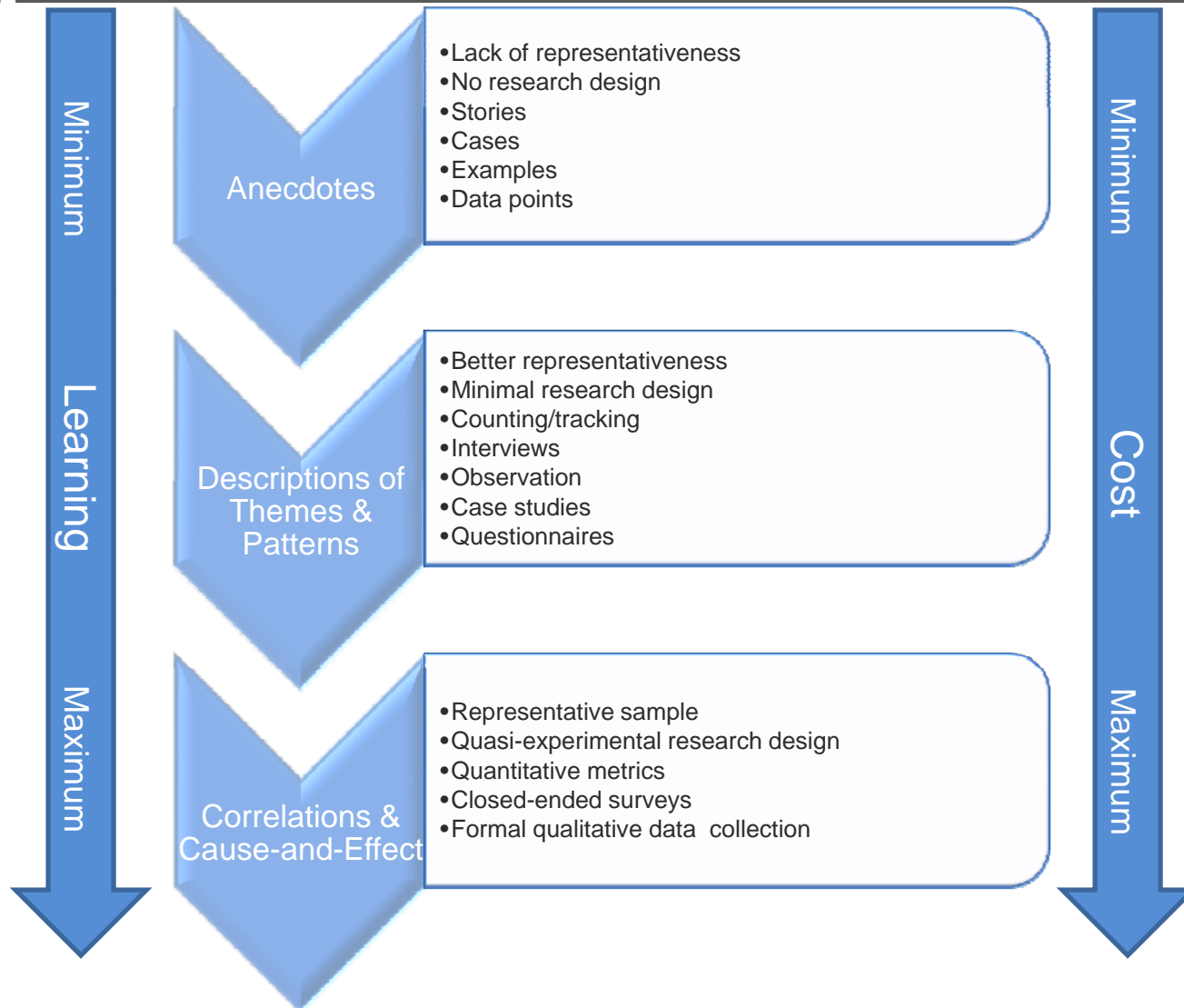
Specifics for Working With Grantees

What to Ask for in a Grantee Report



1. Outputs – types and quantity of service delivered /actions taken/strategies implemented
2. Program quality – user/target of service perception of receipt of “best practices”
3. Outcomes that reflect what a program can realistically accomplish
4. Descriptions of what worked – which specific practices and resources seemed key to achieving the outcomes for the target audiences
5. How programs/services/strategies will be improved upon based on lessons regarding “what worked”

Supporting Learning Capacity Building





*Funder Collaboratives
for Evaluative Learning*

Funder Collaboratives

Reasons funders collaborate on evaluation:

- Maximize learning across grantee organizations
- Maximize learning across funders within a given field, sector and/or geographic community
- Maximize usability of data, findings and recommendations
- Develop communities of learners specific to particular sectors, subsectors and/or geographic communities
- Accountability for philanthropic stewardship

How funders can collaborate:

- Support organizational and/or sector evaluative learning projects and processes
- Support the development of capacity building and capacity builders for learning facilitation
- Engage in philanthropic learning processes as groups of funders, sharing common programs, grantees, etc. (walk the talk)

Questions & Answers