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.”


Or, a method for finding out what happened, how & why…
The Steps in An Evaluation

Seven Common Steps in Evaluation:

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
6. Gathering, analyzing, and interpreting the data
7. Using the evaluation findings
Evaluation: Using the Wrong Model

- Resources
- Strategies
- ST Outcomes
- LT Outcomes
- Community/ Social Impact
Evaluative Learning: Changing the Model

- Resources
- Strategies
- Achievable Outcomes
- Research says...
- Community/Social Impact
# Shifting Evaluation to Learning

| Accountability focused: | **Accountability-based evaluation**: evaluation efforts that answer one or more of the following questions:  
| --- | ---  
| Did it Work? | • 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: | **Evaluative learning**: evaluation efforts that answer the following questions:  
| What Worked? | • 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

Assumptions & Approach
- Literature Review to ID Connections Between ST and LT Outcomes, BPs, and Measurement Tools
- Proximate Program LM
- Methods & Measures

Design Meeting
- Program modifications

Gather Data
- Positive deviants
- Qualitative
- Quantitative
- Background
- Conditions

Designer/Leader Analysis
- Facilitation of deeper dive
- Conclusions & recommendations

Expert Analysis
- Inferential
- Describe success w/causes that create the best effects
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

Anecdotes
- Lack of representativeness
- No research design
- Stories
- Cases
- Examples
- Data points

Descriptions of Themes & Patterns
- Better representativeness
- Minimal research design
- Counting/tracking
- Interviews
- Observation
- Case studies
- Questionnaires

Correlations & Cause-and-Effect
- Representative sample
- Quasi-experimental research design
- Quantitative metrics
- Closed-ended surveys
- Formal qualitative data collection
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