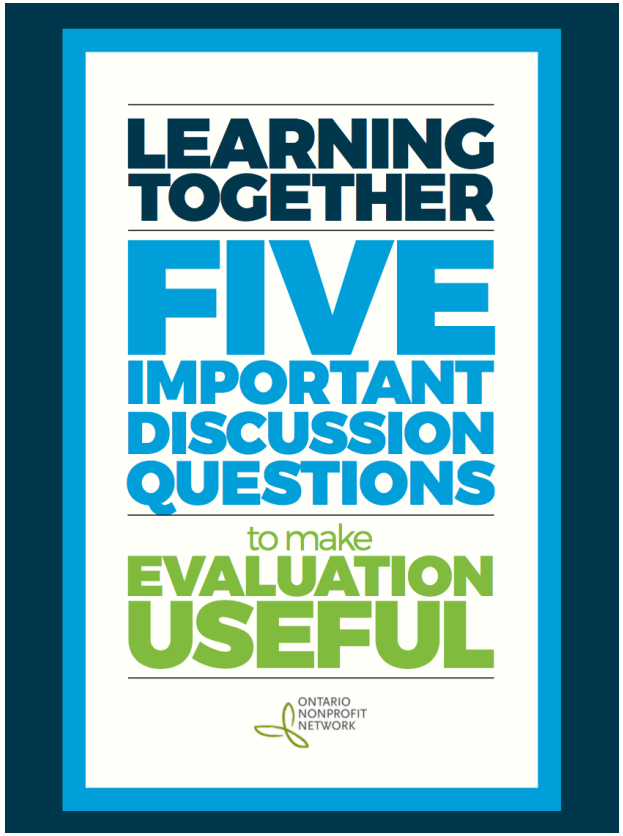
Introducing a Guide for Negotiating Evaluation Expectations

Andrew Taylor,
Taylor Newberry Consulting
Ben Liadsky,
Ontario Nonprofit Network



ONTARIO NONPROFIT NETWORK

Ontario

TaylorNewberry
CONSULTING
Evidence Insight Action

Agenda

1. Who we are
2. What we do – Developing a Sector Driven Evaluation Strategy
3. Introducing Learning Together (A Discussion Guide)
4. “Prototyping” - Setting up the activity

Developing a Sector Driven Evaluation Strategy

- Many in the nonprofit sector feel like evaluation isn't working as well as it could (Funders have also told us this)
- Evaluation is a big systems issue
- Can be a huge asset when we get it right
- Most of the focus is on the *how to* and not enough is on the *why*

What We Heard From Nonprofits

Inconsistent

Headache

Misunderstood

Top-down

Non-negotiable

Lack of Capacity

Last Minute

Not read

Spun

Proving the obvious

Focused on numbers

Inaccurate

Uncoordinated

Accountability

Under-funded

What we heard – Importance of Negotiation

“In our project, we had three national partners. Within each community there were different sectors involved: business, people living in poverty, etc. There were a lot of meetings and it took a lot of time, a lot of angst. We had to challenge ourselves a lot. We need to create resources that give enough guidance to engage in this kind of process.”

What we heard – Safe Space for Reflection

“We try to be very honest with funders, but sometimes it feels like you are not sure how honest to be. We are a very new organization. There is often a big learning curve. It is hard to tell a funder ‘holy crap, we are doing way too much!’ There were these really big things we learned, that we deviated from a plan, maybe we ‘failed.’ Always that fear factor that you will never get funded again because you suck at everything! We know this is widespread and we are in great company. We are not the only ones!”

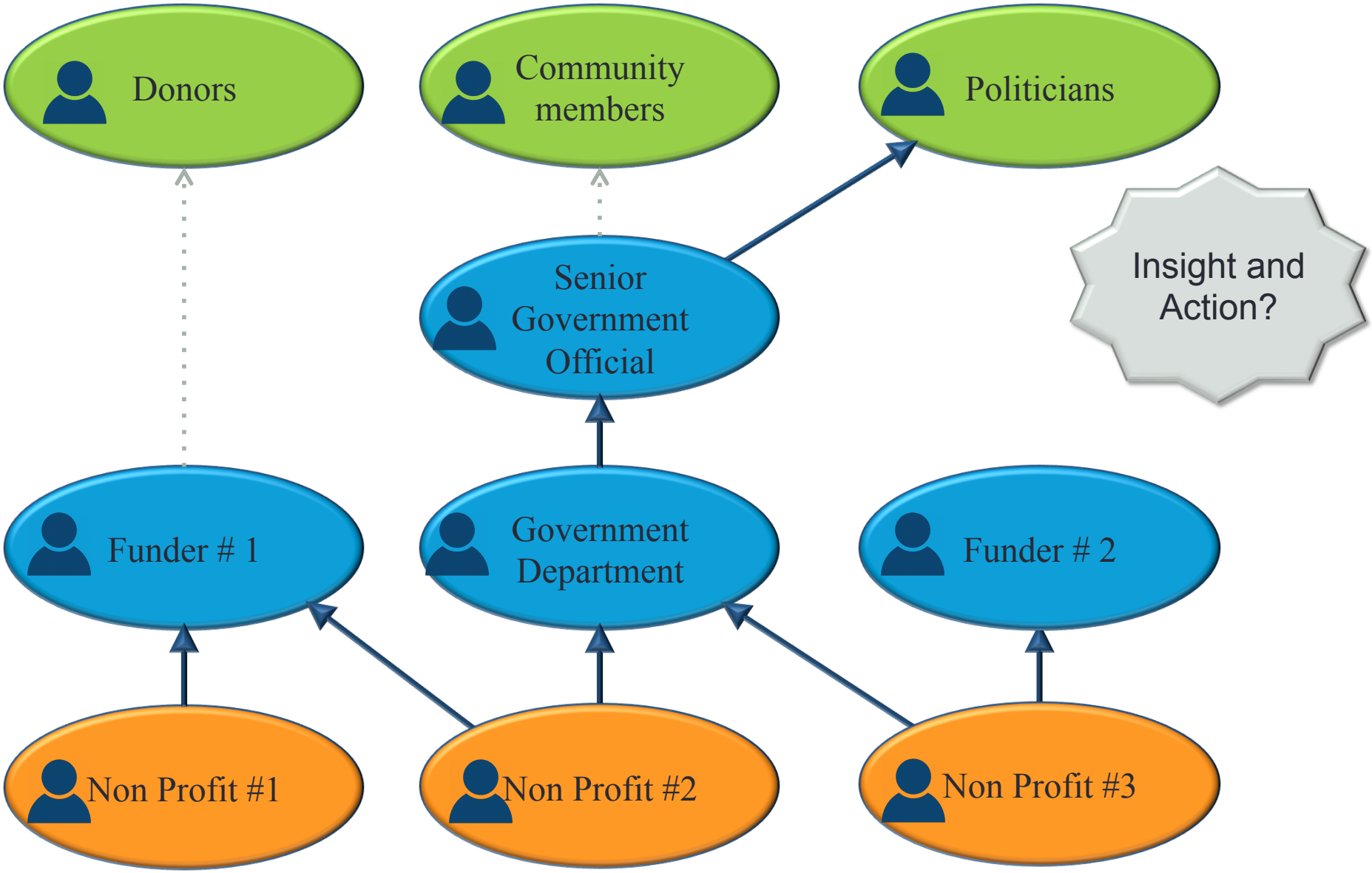
5 REASONS WHY EVALUATION DOESN'T LEAD TO ACTION

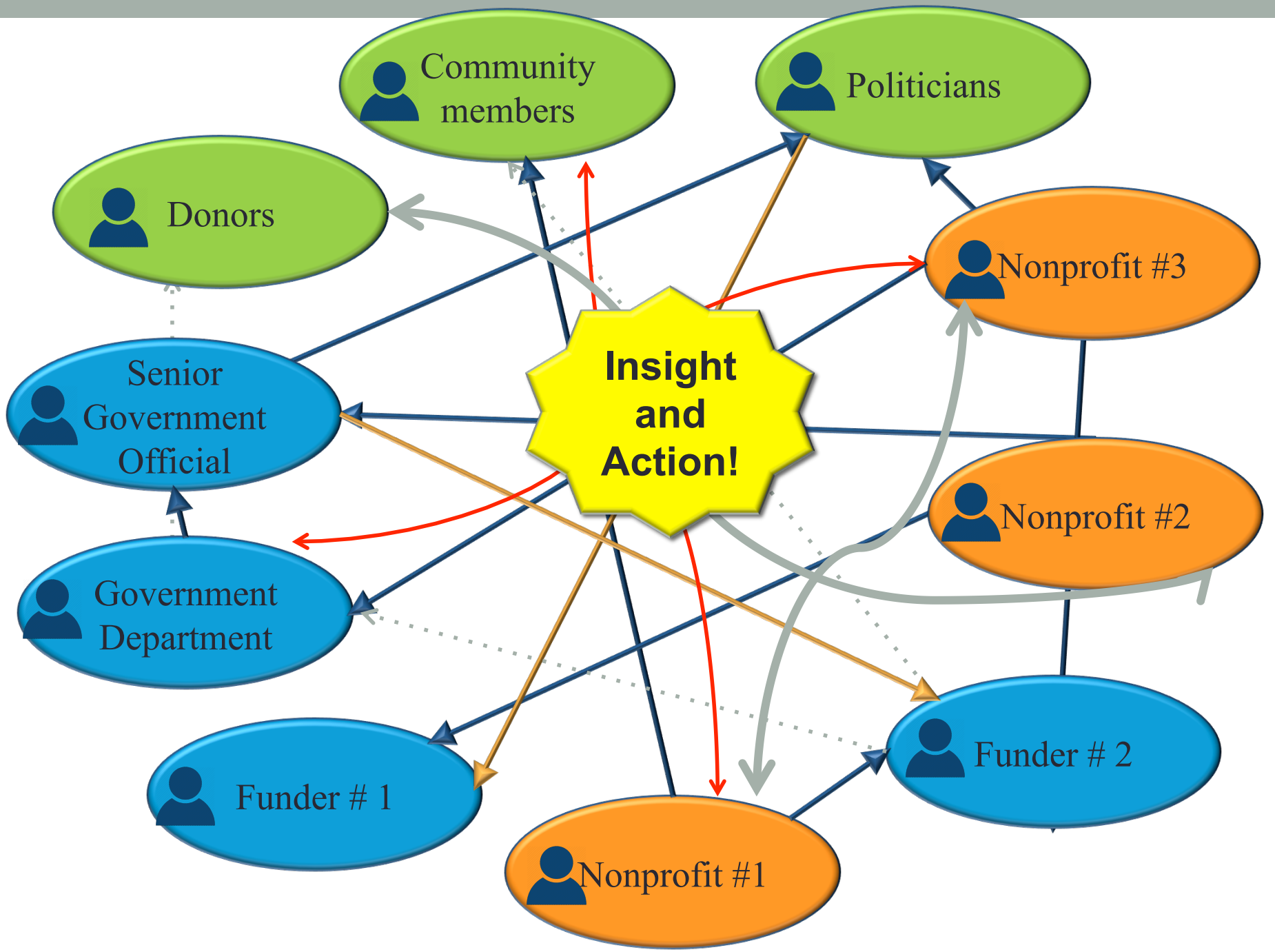
- Ineffective communication
- Asking the wrong questions
- Approach ≠ expectations
- Investment ≠ expectations
- Prioritizing accountability over learning

LEARNING FROM THE LITERATURE SECTOR DRIVEN EVALUATION STRATEGY

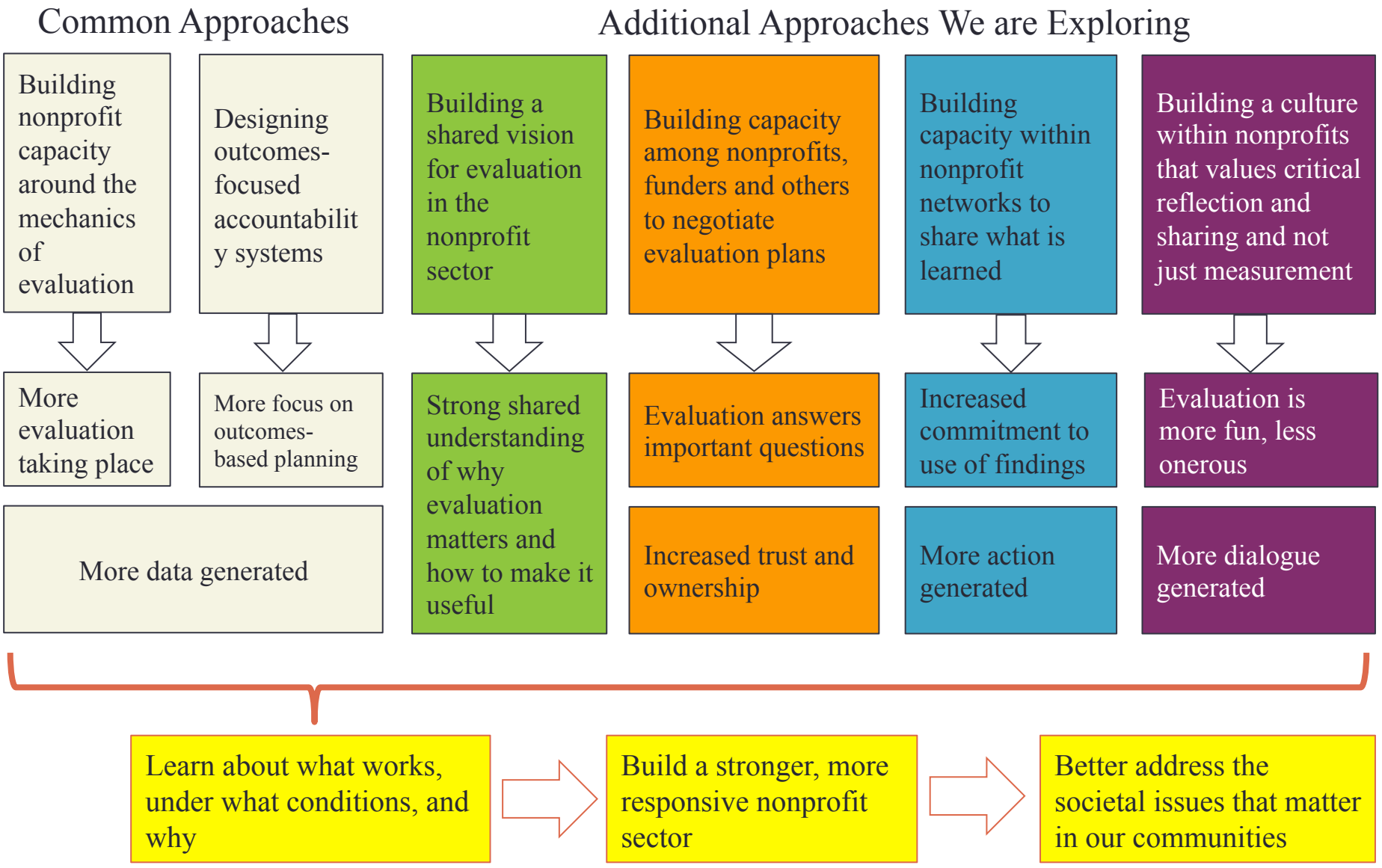
RESEARCH TELLS US THAT THE FOLLOWING SIX FACTORS ARE KEY TO A USEFUL EVALUATION:

How Does Evaluation Communication Flow in Funder-Mandated Evaluations?



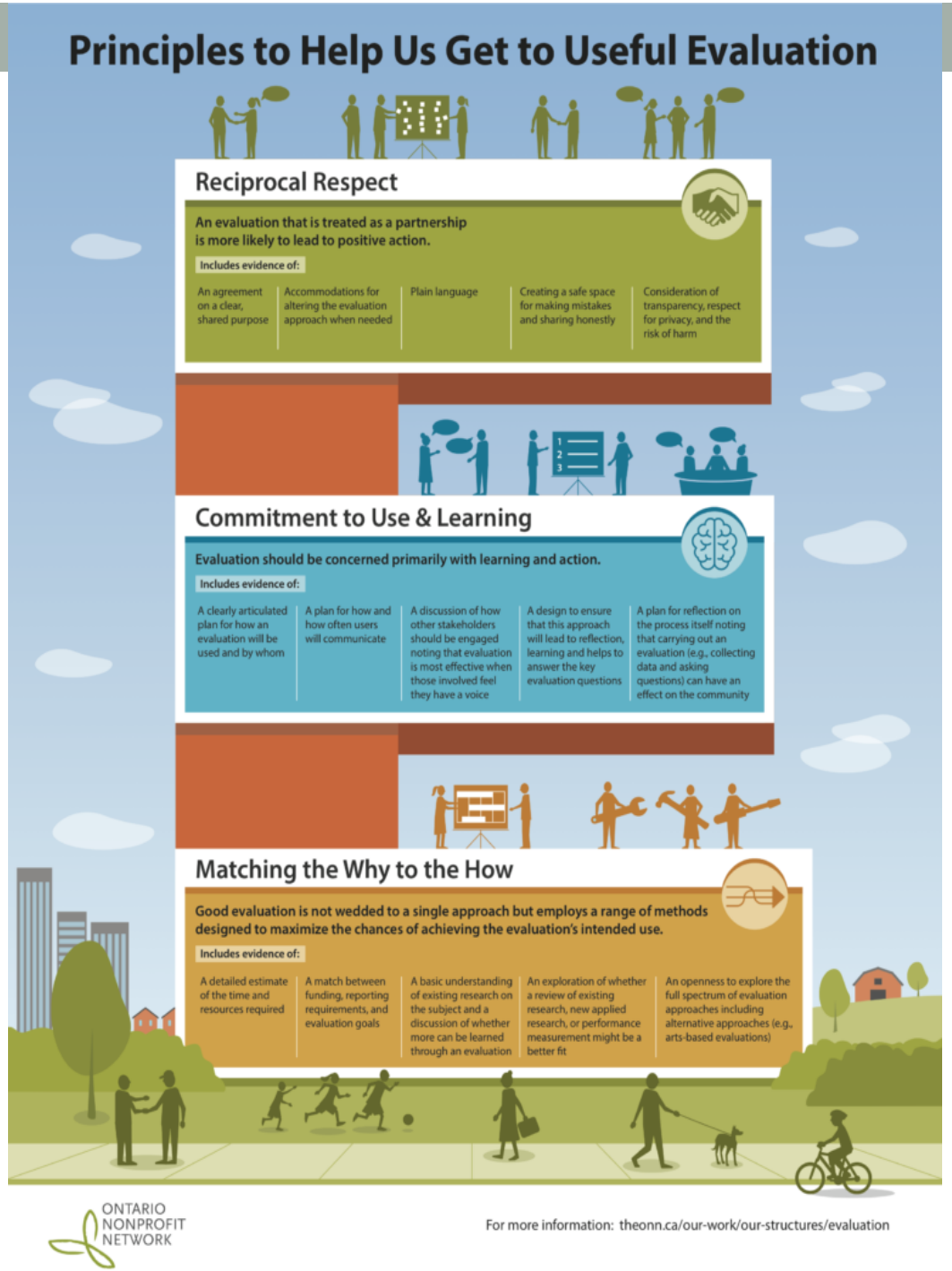

Community members
Politicians
Donors
Nonprofit #3
Insight and Action!
Senior Government Official
Nonprofit #2
Government Department
Funder # 2
Funder # 1
Nonprofit #1

Building a Nonprofit System That Promotes Useful Evaluation: What More Needs to Be Done?



Principles

- Reciprocal Respect
- Commitment to use & Learning
- Matching the Why to the How



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

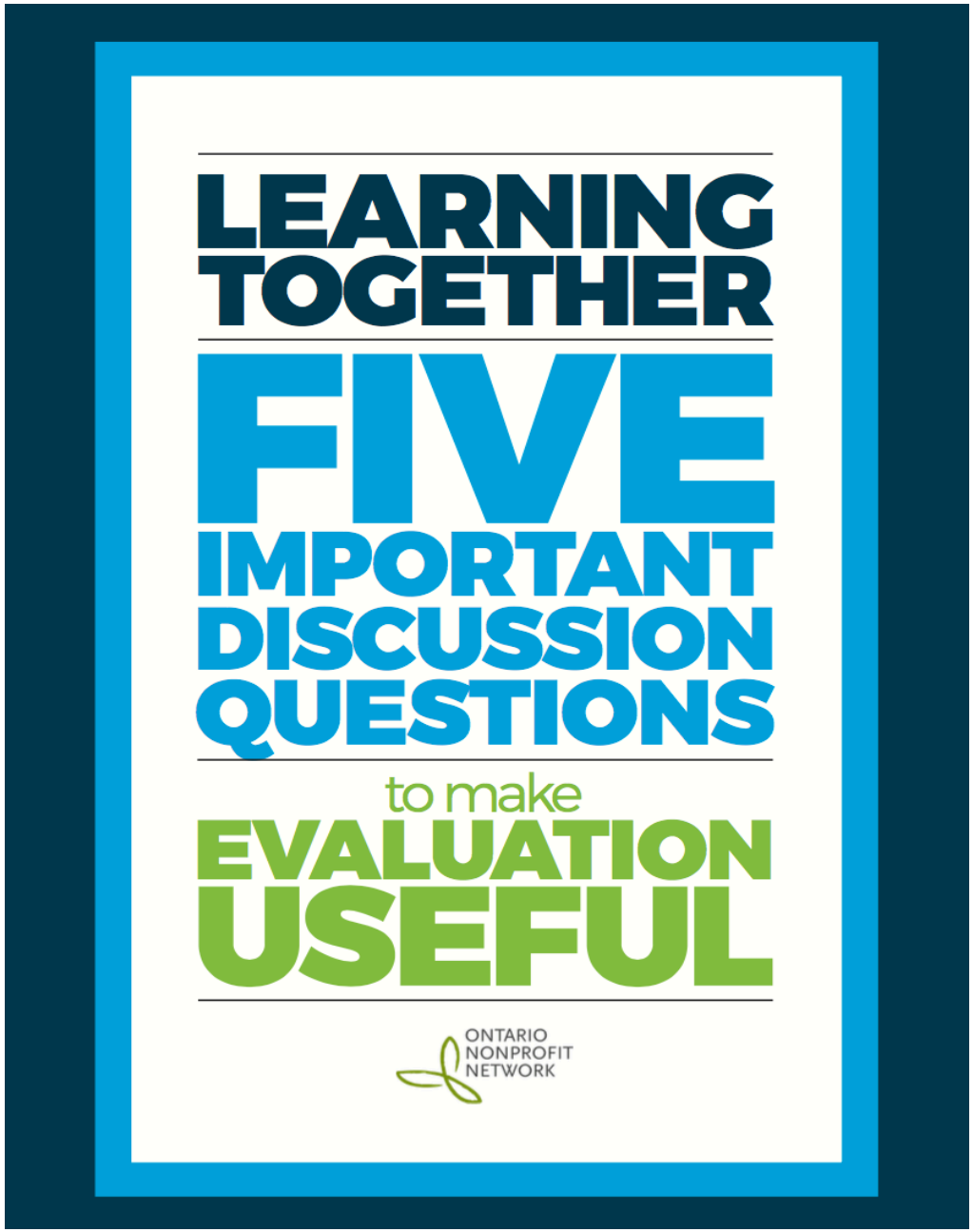
Matching the Why to the How

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)

ONTARIO NONPROFIT


LEARNING TOGETHER
FIVE IMPORTANT DISCUSSION QUESTIONS
to make
EVALUATION USEFUL
ONTARIO NONPROFIT NETWORK

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?

Setting Up the Activity – Some ground rules

1. Don’t need to be an expert
2. Have fun — make it realistic
3. Refer to the info on your seats
4. Let others tag in

You're at a Funder Information Session

During the presentation the funder explains that outcome measurement is going to be a key component of the process. Grant applications are to align with a list of priority outcomes and grant recipients will be expected to report on how they have measured their contributions to these outcomes.

You feel these outcomes are good, but a bit ambitious and you aren't clear on exactly what kind of evaluation work you will be expected to do. You'd like to ask for clarification. At the same time, you don't want to give the funder the impression that your organization isn't supportive of the new direction.

You're at a Meeting with Your Board

You are an executive director with an interest in getting your organization to do more evaluation. **You think it will put your organization in a stronger position when applying for grants and you also think it will improve service.** However, your board of directors is cautious. They don't want the organization to take time away from providing service to clients, in order to "do paperwork."

How do you start the conversation with them?

You're at a 1:1 Meeting with a Potential Funder

You are interested in applying for a grant from a funder. You share their vision of combatting climate change, but are concerned by the requirement that all grant recipients pick one outcome from a list and focus their project on that. The outcomes on the list are all very concrete, but are also more long-term (e.g. an increase in the percentage of people who cycle or walk to and from work, the amount of greenhouse gases reduced, etc.). Your program is focused on building environmental awareness at a community level and is primarily about engagement.

You have a great evaluation system in place and it works really well for you. However, it only focuses on the small steps that your organization is taking to help make your community more engaged on environmental issues (e.g. showing up to events, participating in discussions more frequently, etc.).

HOW DO YOU RAISE THIS CONCERN WITH YOUR FUNDER?

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?

Stay Connected

Website: http://theonn.ca/our-work/our-structures/evaluation/
Twitter: @o_n_n
Linkedin: Ontario Nonprofit Network
Facebook: Ontario Nonprofit Network
Email: ben@theonn.ca | andrew@taylornewberry.ca