Evaluation as a Tool for Leveling Power Differentials Between Funders and Nonprofits

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Mission

A Quaker-based, philanthropic organization committed to transforming how mental health is viewed and advancing innovative approaches to behavioral health care delivery and policymaking.

Vision

The Foundation's vision is to challenge, disrupt, and change how behavioral healthcare is envisioned, organized, and practiced in the Philadelphia region and beyond.

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RECOGNIZING A NEED AND OPPORTUNITY

- Recognition that too often funders are driving evaluation priorities versus nonprofits themselves

- Opportunity to support organizations in engaging in evaluation for themselves

- As a smaller funder see evaluation capacity building as an opportunity for broadening the impact of our resources

- What is your organization and role?

- What brought you to this session?

- What do "power differentials" around evaluation and use of data look like in your community?

EVALUATION: A DRIVING FORCE IN OUR WORK

We seek to employ evaluation as a tool for supporting greater capacity among Philadelphia organizations - to support them in making use of data and evaluation in ways that improve the effectiveness of their work.

Three key strategies:

- **Evaluation partner:** Drive specific evaluation efforts as a partner that offers understanding of and a different position in the local system

- **Evaluation capacity builder:** Engage through training and consultation with individual organizations to support internal capacity building and help them to take greater control of their own data and the narratives they offer,

- **Convener of evaluation stakeholders:** Foster networks of organizations and funders that allow for coordinated efforts around addressing evaluation barriers and needs that can support community impact

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1 / Direct Evaluation Support

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DIRECT EVALUATION SUPPORT

Key Premise

Strong program planning and evaluation helps set programs up to succeed by ensuring that teams generate and act on learning

Offerings

- Help establish systems of data collection and use that help teams to learn
- Specifically, prioritize opportunities for convening partners and facilitating conversations around data

Assets

- Existing position in community that offers opportunity for sharing and engaging stakeholders in unique ways
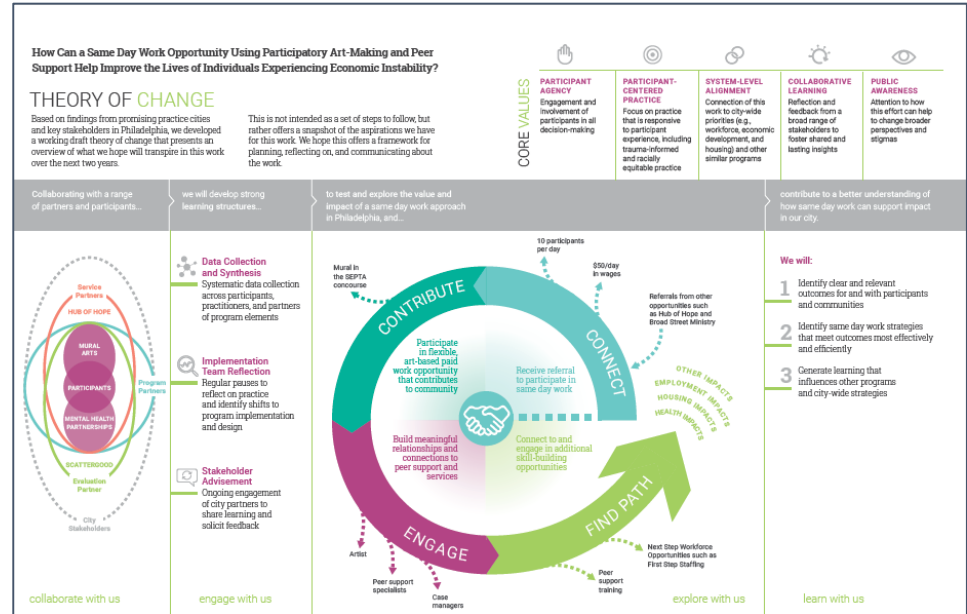- Ability to offer additional monetary and in-kind resources to fill gaps

Challenges

- Questions around role clarity – what hat is organization wearing and when
- Overextension of staff, because of greater flexibility re: resources

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EXAMPLE: SAME DAY PAY PROGRAM

Core activities

- Discovery Phase Research

- Theory of Change Development

- Data Collection Tool Development

- Ongoing Analysis and Synthesis

- Engagement in Weekly Implementation Team Meetings

- Facilitation of Reflection Workshops

- Responsive Engagement with Key Stakeholders

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2 / Evaluation Capacity of Organizations

Role: Evaluation Capacity Builder

EVALUATION CAPACITY OF ORGANIZATIONS

Key Premise

Organizations that build and develop their own evaluation capacity engage in learning and development across programs and over time, increasing organizational effectiveness

Offerings

Support organizations in drawing on and developing their own internal evaluation capacity through:
- Group training,
- Facilitated peer consultation, and
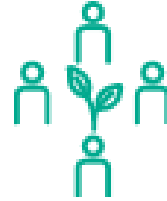- Individualized consultation opportunities

Assets

- Ability to seed opportunities for organizations through own investments
- Ability to connect to and leverage outside capacity building partners
- First-hand recognition of the challenges and opportunities organizations have sharing data and impact with funders

Challenges

- Specific individuals who have received training with their team often leave organizations
- Size of cohorts need to stay small enough to facilitate learning, limits who has access to opportunity

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EXAMPLE: **Community Fund for Wellness**

Core activities

- Paired with participatory grantmaking process: pooled funding granted by community advisory

- Grantees receive dollars plus evaluation capacity building support during planning and post award

  - Key topics: Logic model development, data collection, data analysis, data use

  - Key mechanisms: training, facilitated peer consultation, coaching

Community Fund for Wellness

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3 / Community Evaluation Capacity

3

COMMUNITY EVALUATION CAPACITY

Key Premise

Broader buy-in of funders and a widening nonprofit community that has access to evaluation capacity building resources offers opportunities for community-level impact.

Offerings

Engage and convene community of funders to support joint evaluation capacity building efforts to:
- Expand scale of capacity-building, and
- Influence funder practices to better support data use and evaluation in organizations

Assets

- Existing relationships with local funders to bring them into this work
- Ability to attract national funders and interests to the local community
- Ability to recognize and connect to other capacity building initiatives locally

Challenges

- Navigating priorities of different funding partners
- Changing mindset from "my" grantees to supporting community capacity
- Time need to engage and convene funding community partners

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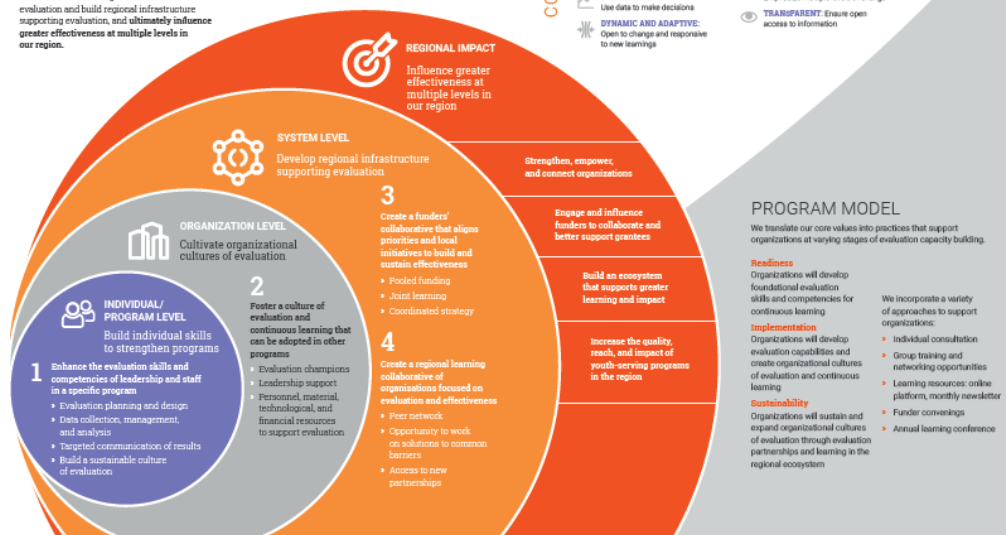**EXAMPLE:** RISE Partnership

Core activities

- One-on-one funder engagement

- Quarterly funder meetings

- Broader dissemination of initiative-level efforts: e.g., Theory of Change

- Ongoing recruitment of additional funders

- Relationship-building and coordination with other local capacity building efforts

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- What are the gaps in evaluation and use of data that you see in your communities?

- Is it important to address these? Why or why not?

- What are some of the bridges or additional efforts that can help fill these gaps?

- What's the role that local philanthropy specifically can and should play in this?