American Evaluation Association Annual Conference
Evaluation TIERS: A tool for allocating evaluation resources at nonprofit agencies
Demonstration Session 1065 | October 15, 2014

EVALUATION TIERS
A tool for allocating evaluation resources at nonprofit agencies

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Jewish Family & Children's Service (Waltham, MA)

AEA Evaluation 2014
Demonstration Session 1065 | Oct 15, 6:15 PM to 7:00 PM

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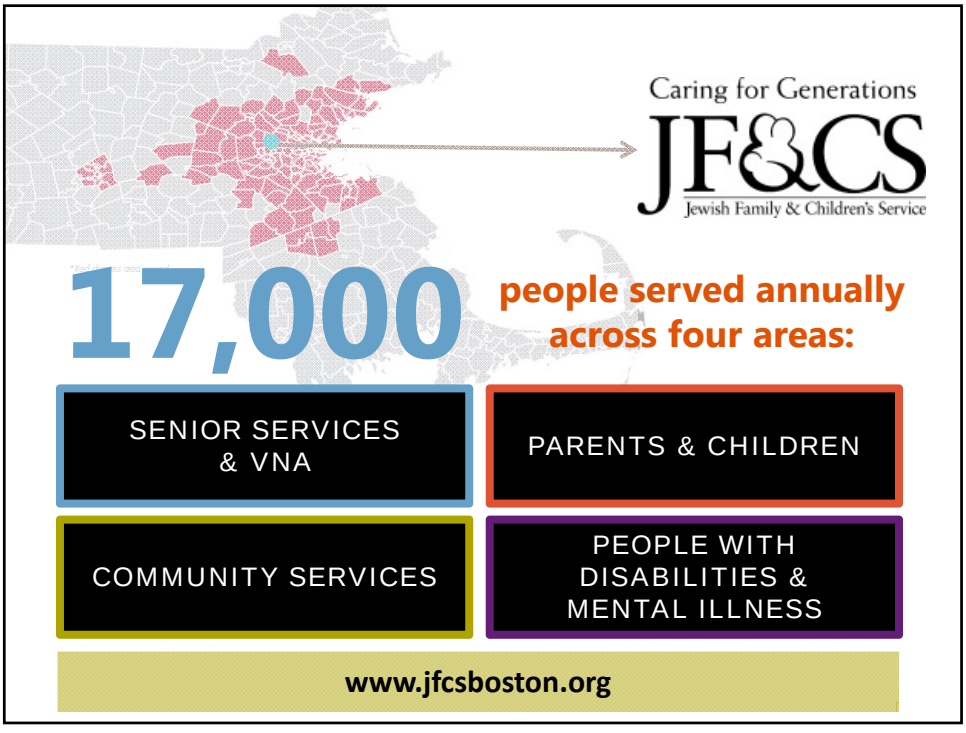
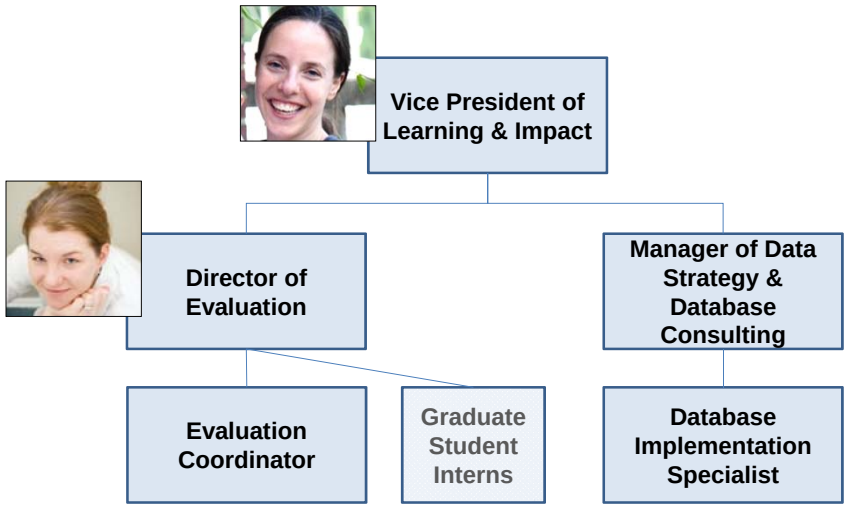
Caring for Generations
JF&CS
Jewish Family & Children's Service

Celebrating 150 Years of Human Connection



THE CHALLENGE…

THE DEPARTMENT OF EVALUATION AND LEARNING ("DEL") AT JF&CS



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WHY EVALUATE?

Foundations

Individual donors

Federal and state grants

Reporting

Hey guys,
did you read this part?

It basically says we need an evaluation to keep getting money.

freshspectrum.com

WHY EVALUATE?

Board of Directors

Agency leadership

Program managers

Operations

Does anyone else feel like we could do better?

freshspectrum.com

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WHY EVALUATE?

Research institutions

Other nonprofits

Evaluation professionals

Learning

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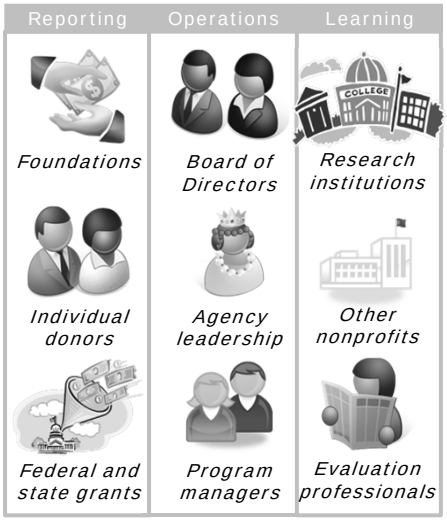
EXAMPLE: HOME VISITING PROGRAM FOR NEW MOTHERS

THE CHALLENGE



"Our opinion drawn from experience is that most organizations should budget from **5% to 10% of the organization budget for evaluation costs**."

- State of Evaluation 2012, p. 5

Morariu, J. & Pankaj, V. (2012). *State of Evaluation 2012: Evaluation Practice and Capacity in the Nonprofit Sector.* Innovation Network. Available from http://www.innonet.org/resources/files/innonet-state-of-evaluation-2012.pdf

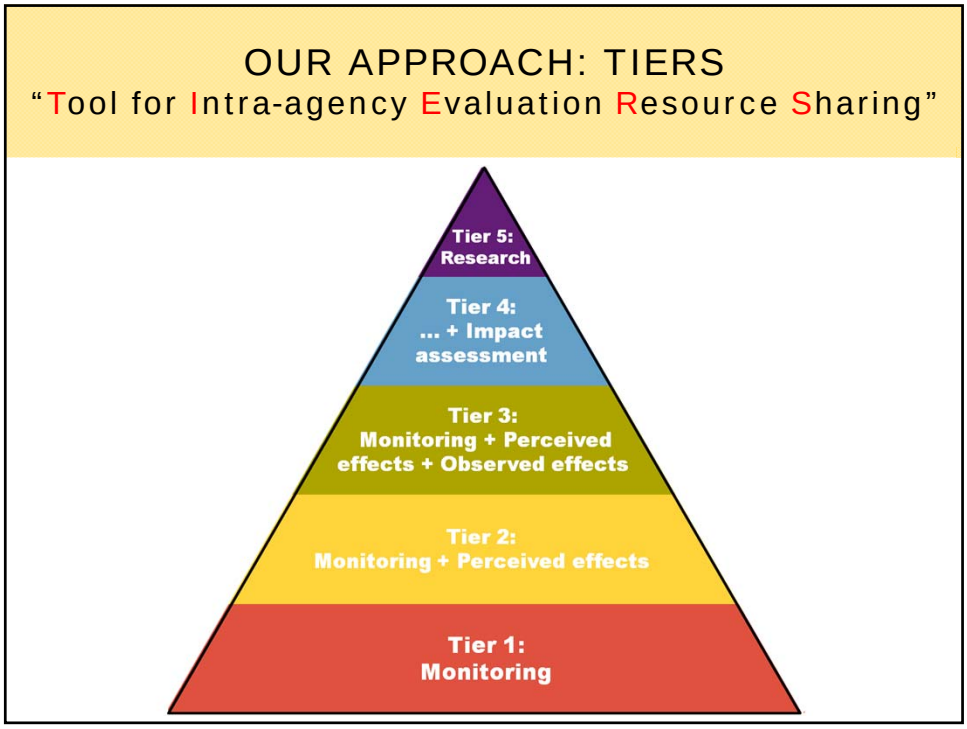
THE QUESTION

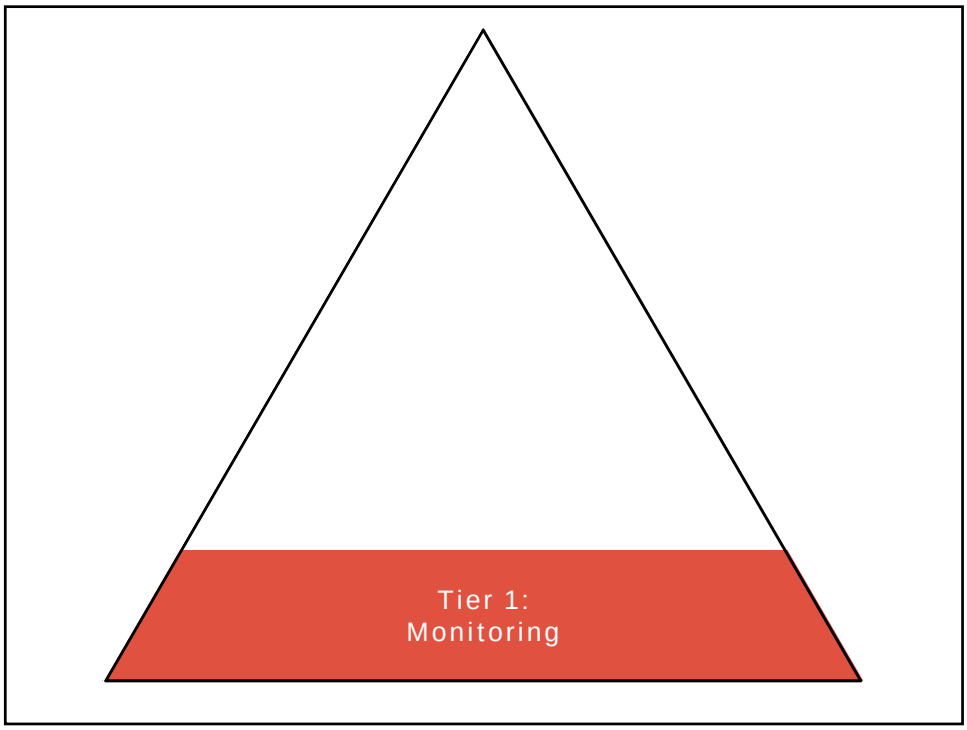
*"What **data** should each program be collecting…*

*given the **questions** that it needs to answer…*

*for its particular combination of **stakeholders** …*

*and the **resources** available?"*





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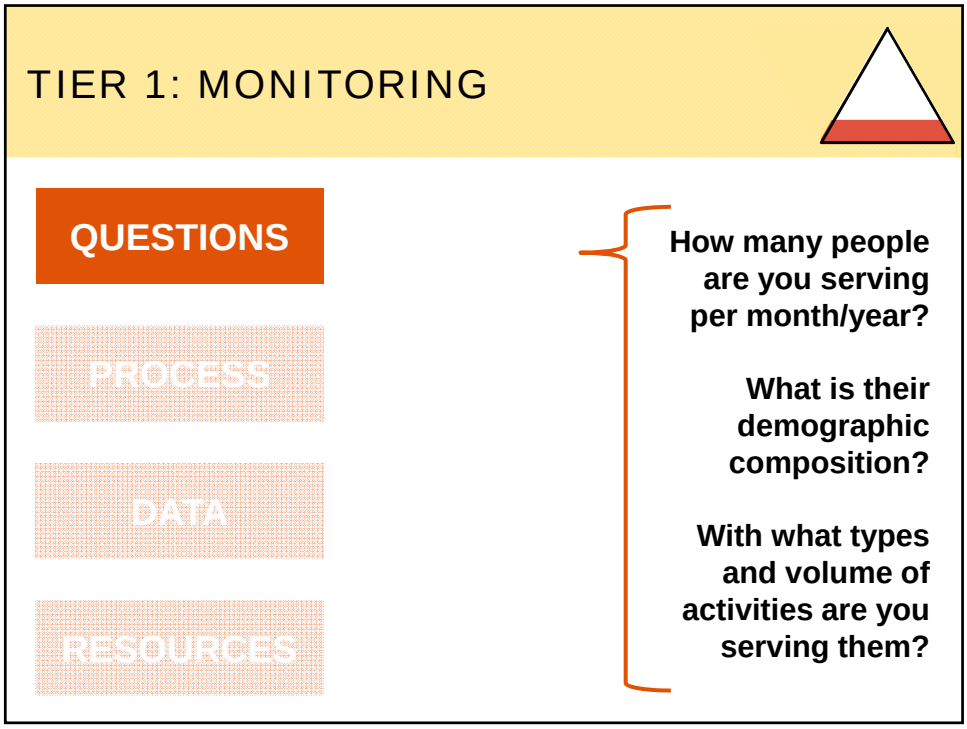

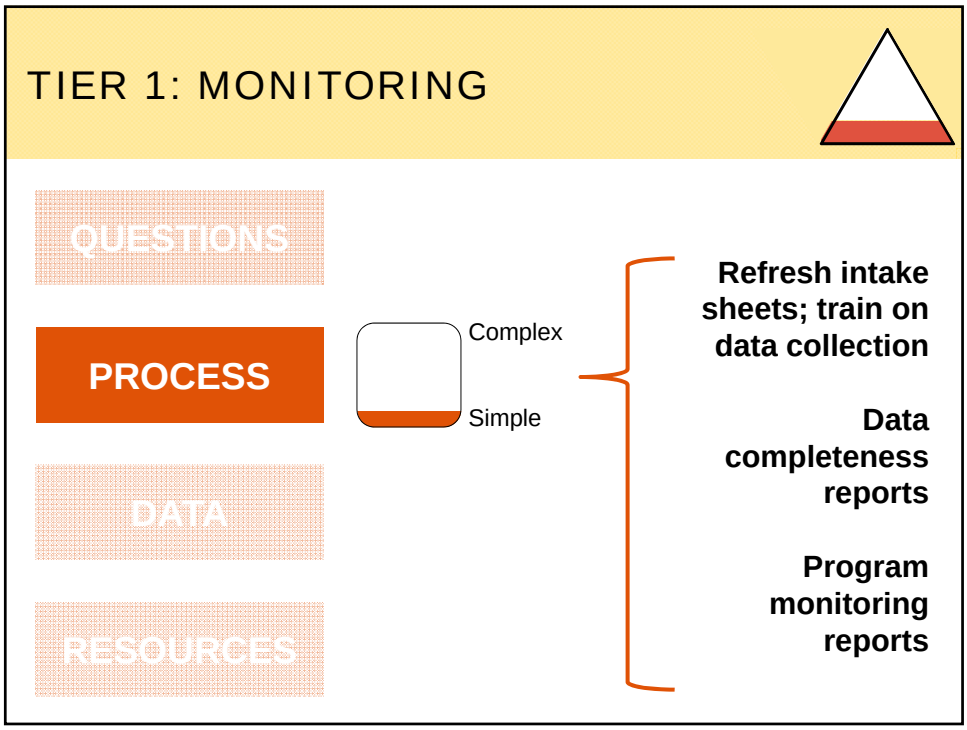

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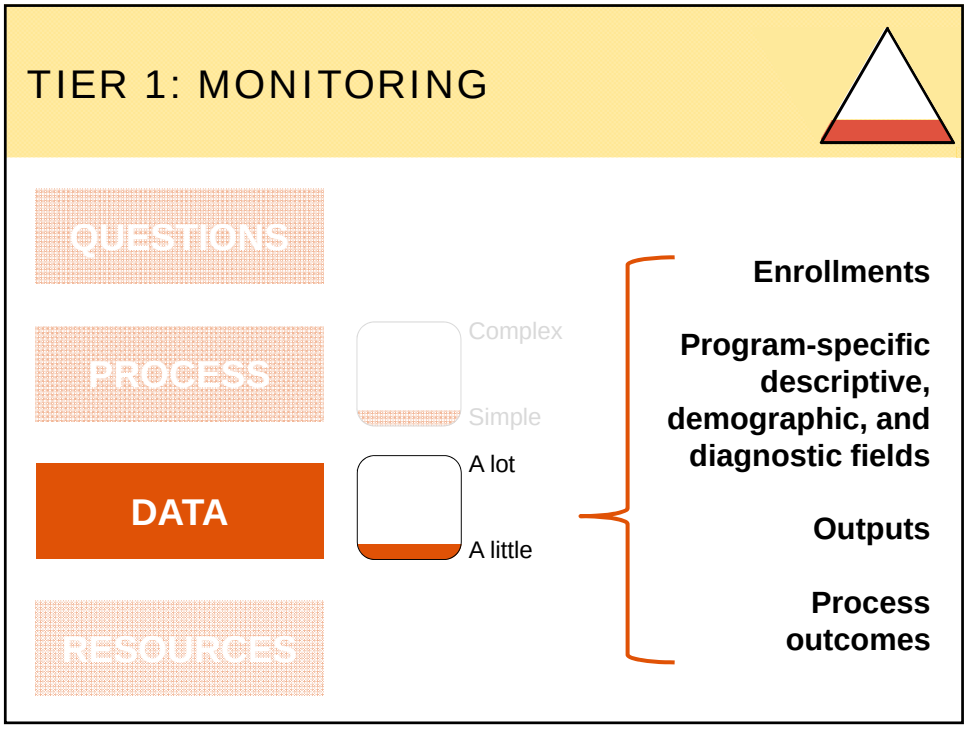

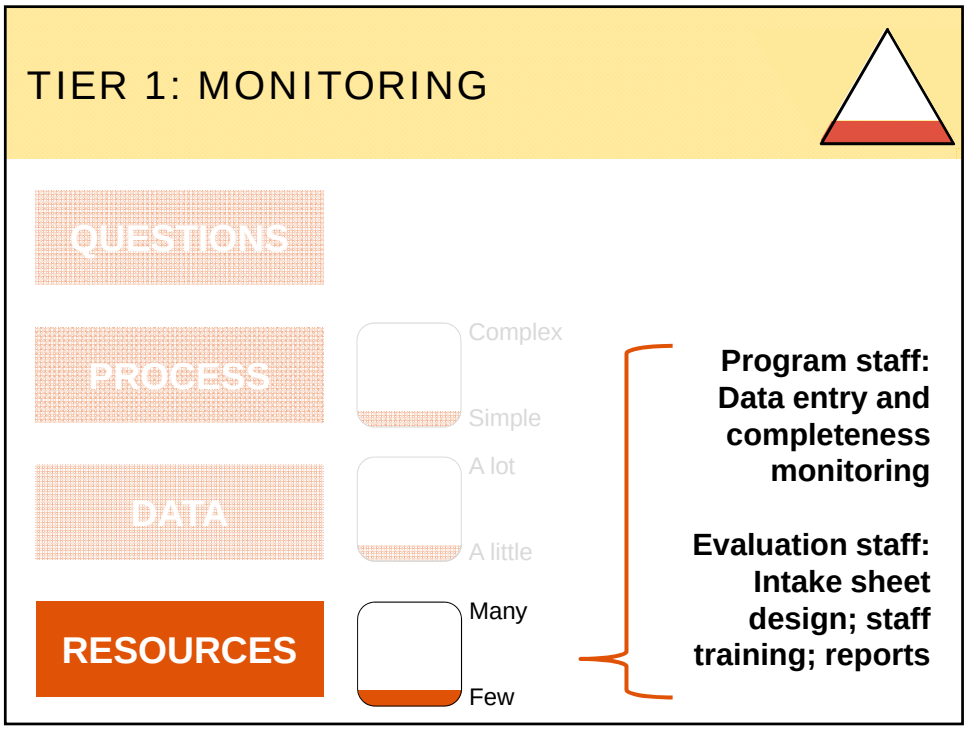

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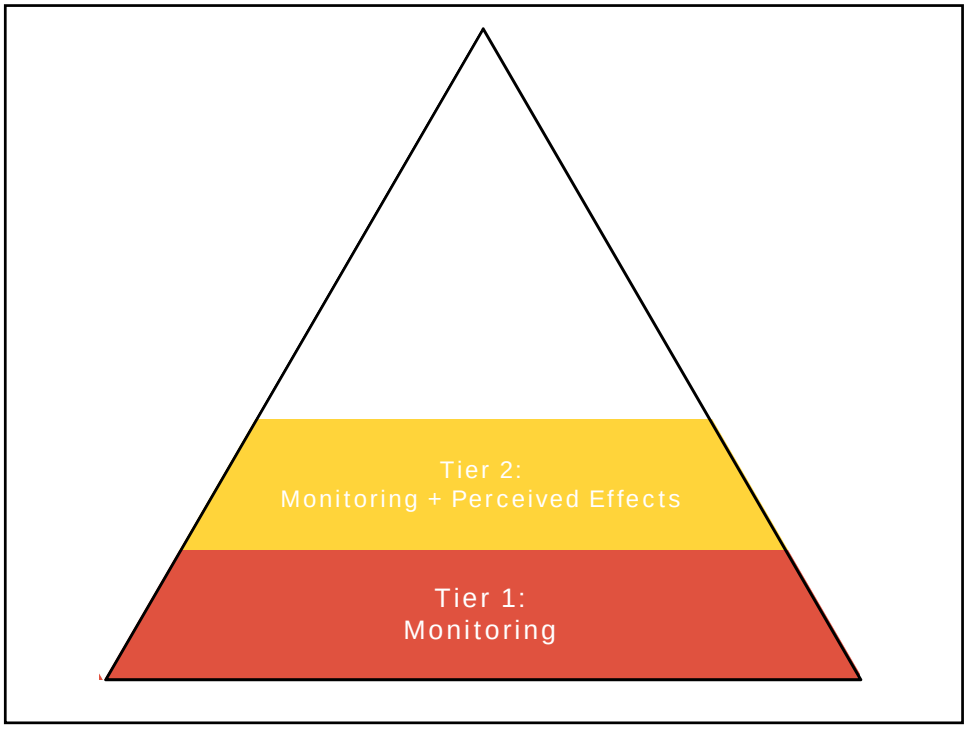

TIER 2: PERCEIVED EFFECTS

QUESTIONS

PROCESS

DATA

RESOURCES

What changes do participants perceive as a result of the program?

Do participants feel the goals of the program were achieved?

What suggestions do participants have for program improvement?

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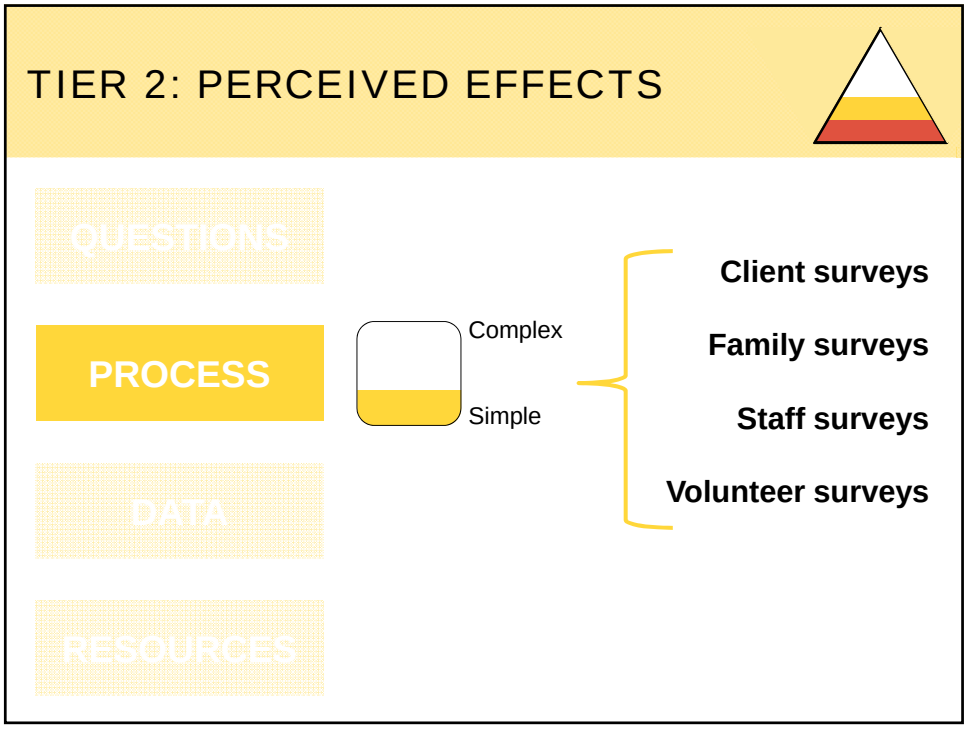

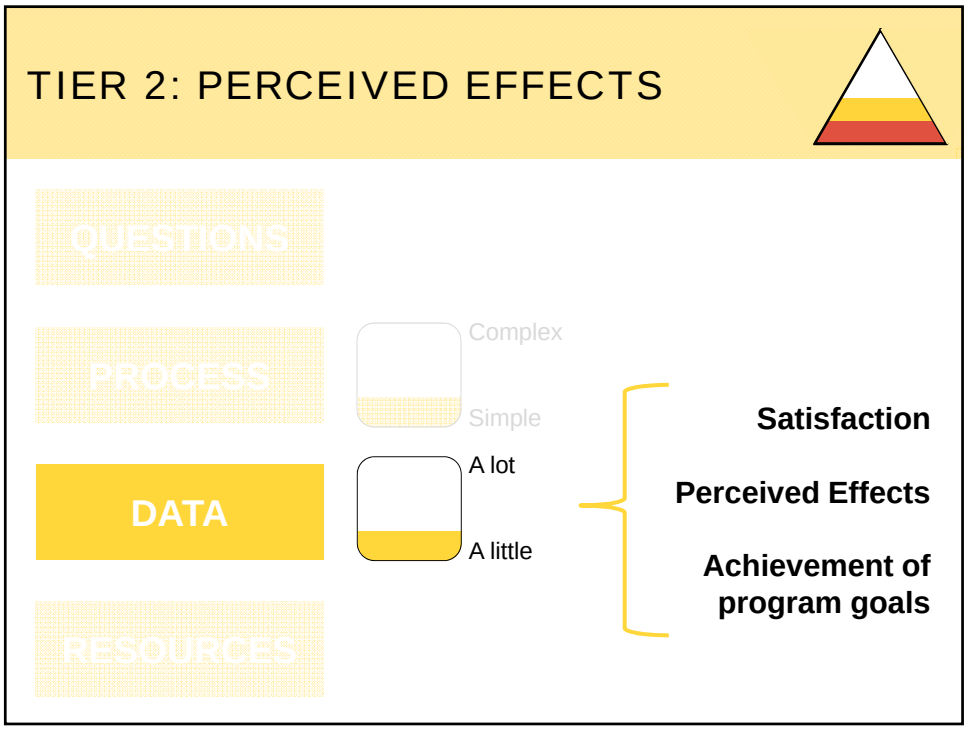

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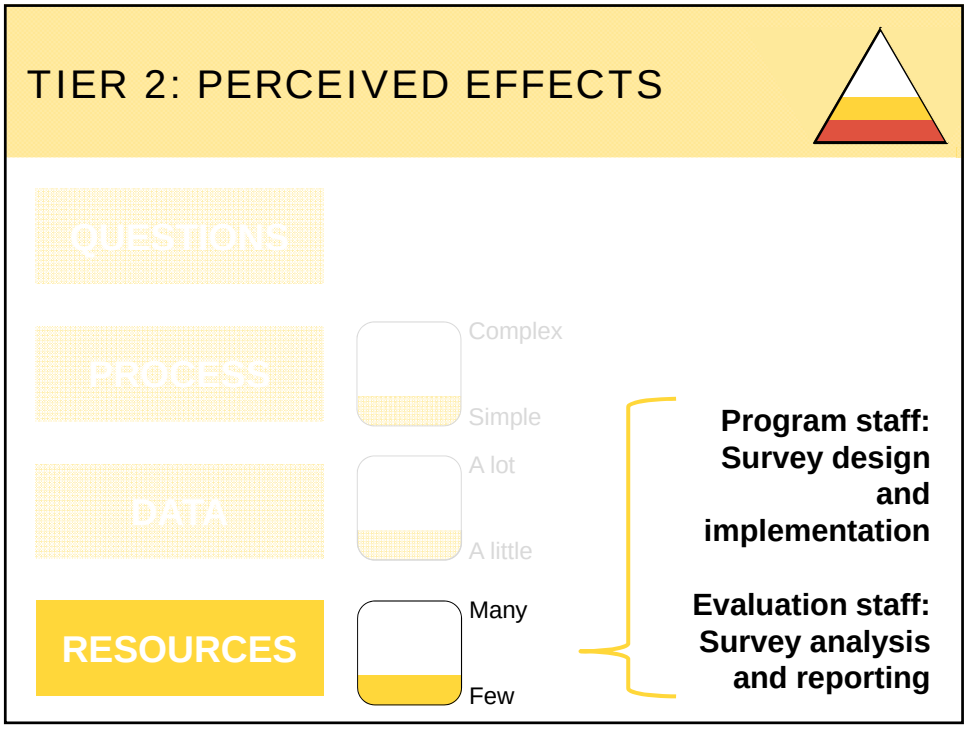

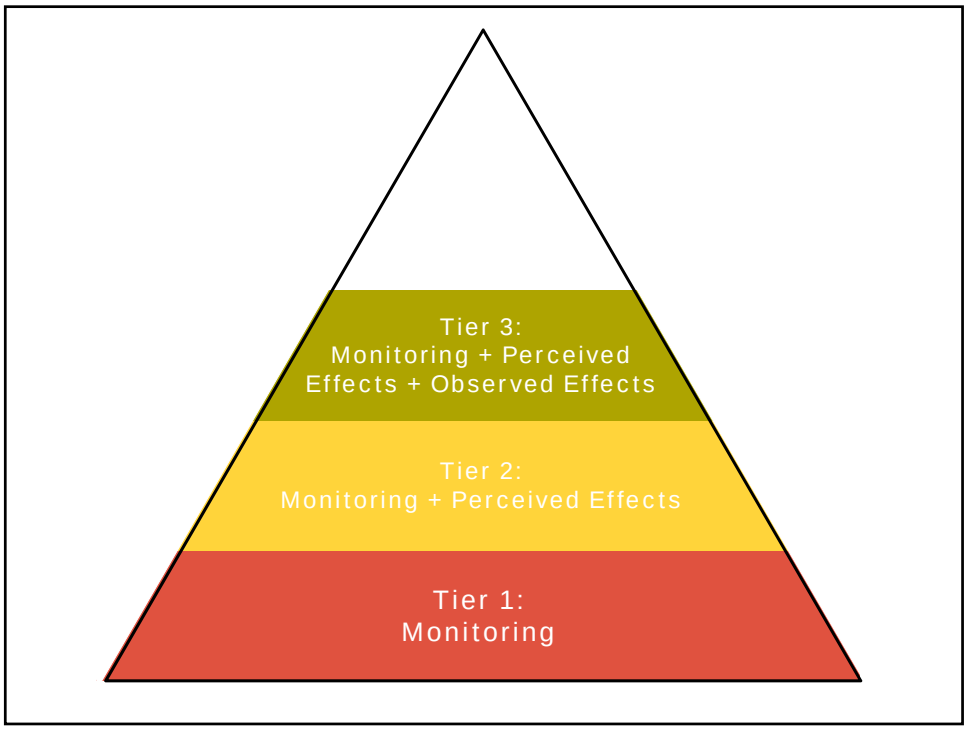

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TIER 3: OBSERVED EFFECTS

QUESTIONS

PROCESS

DATA

RESOURCES

What percent of clients are achieving specific program goals?

What percent of clients are achieving specific individual goals?

TIER 3: OBSERVED EFFECTS

QUESTIONS

PROCESS

DATA

RESOURCES

Goal achievement tracking

Third-party observations

Case notes review

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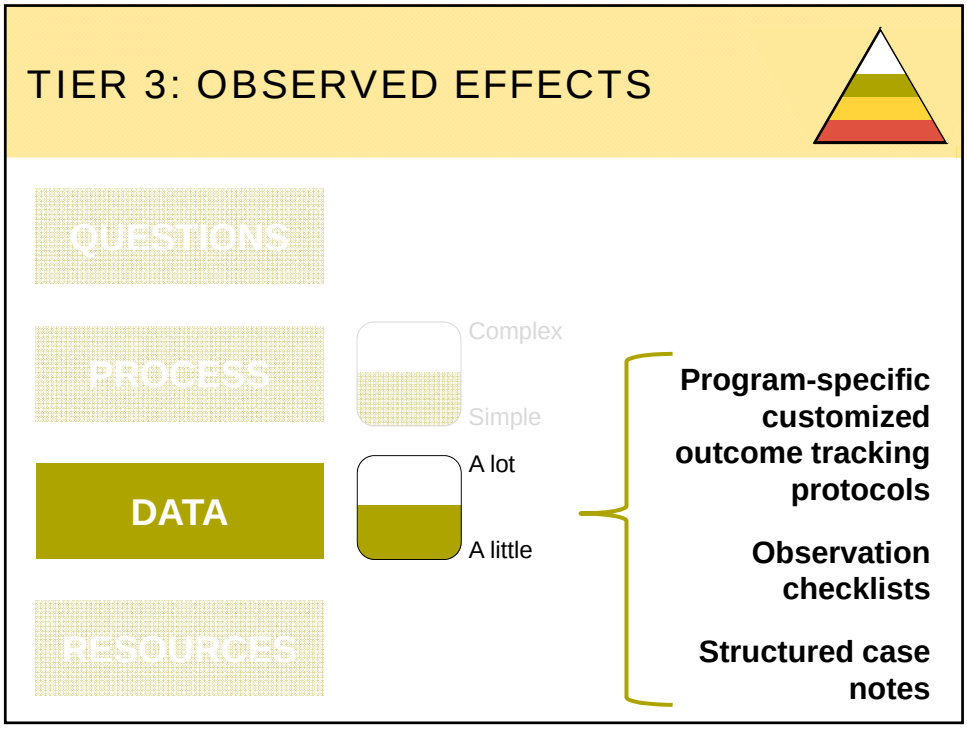

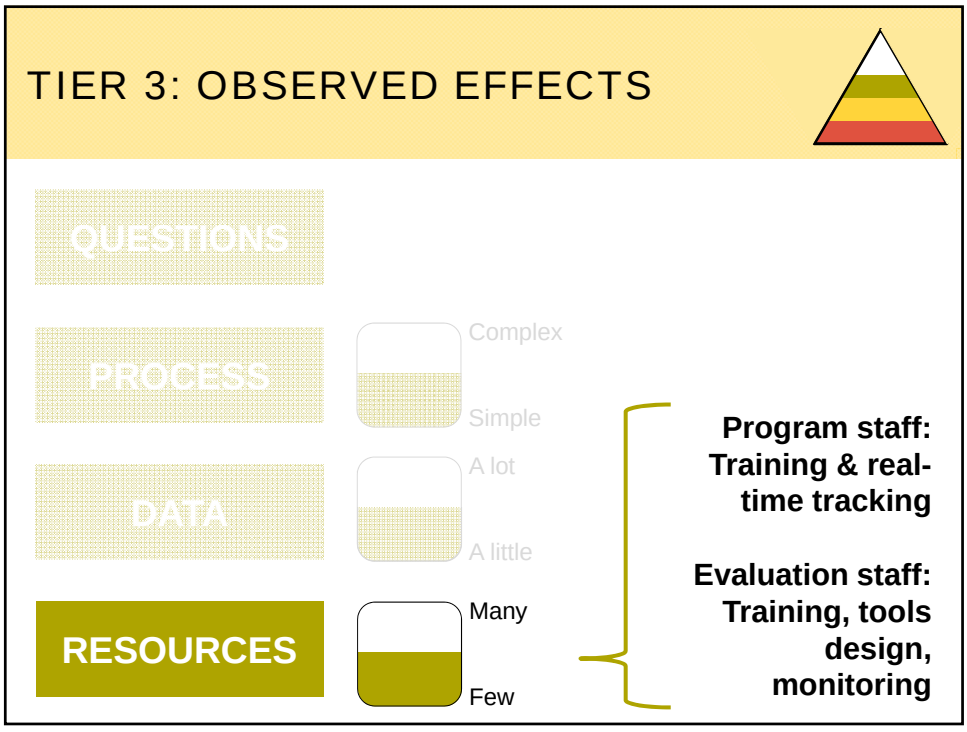

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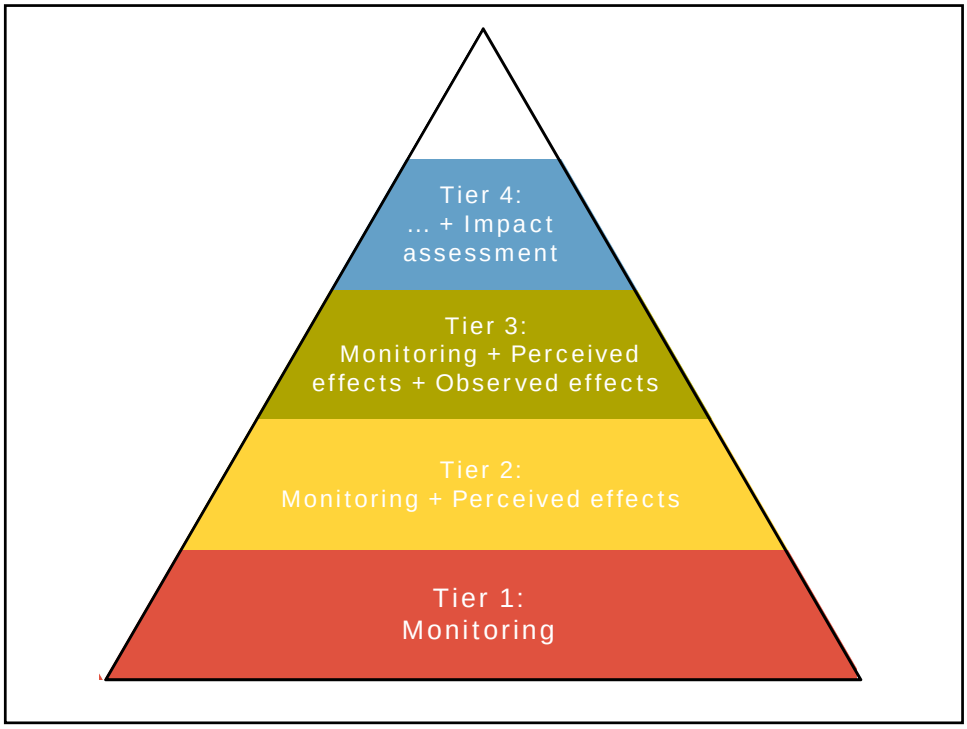
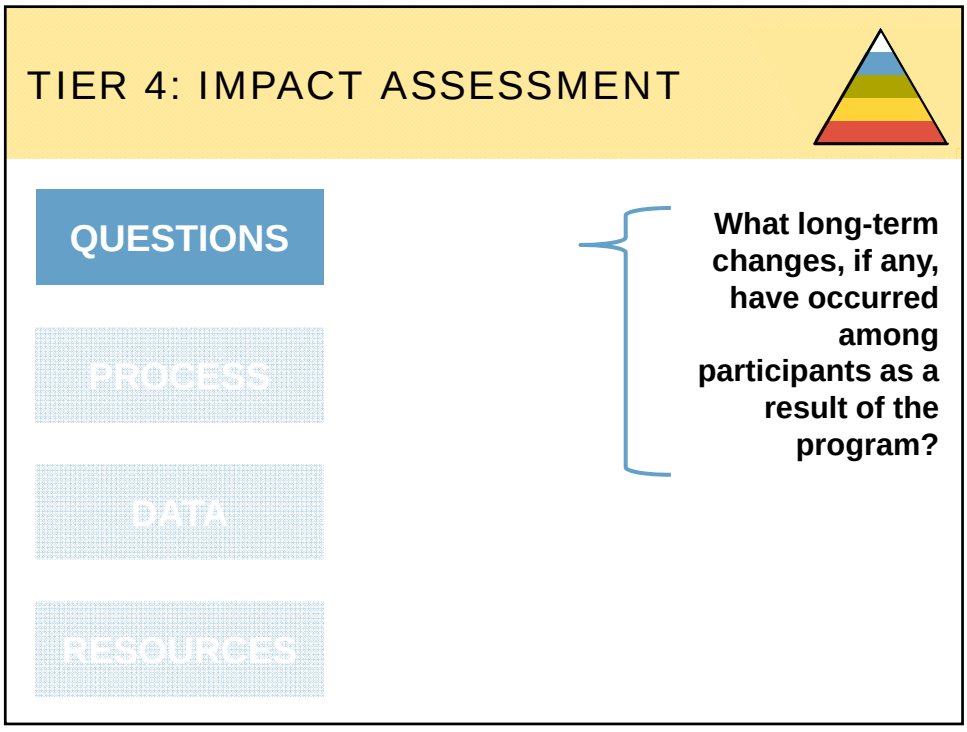
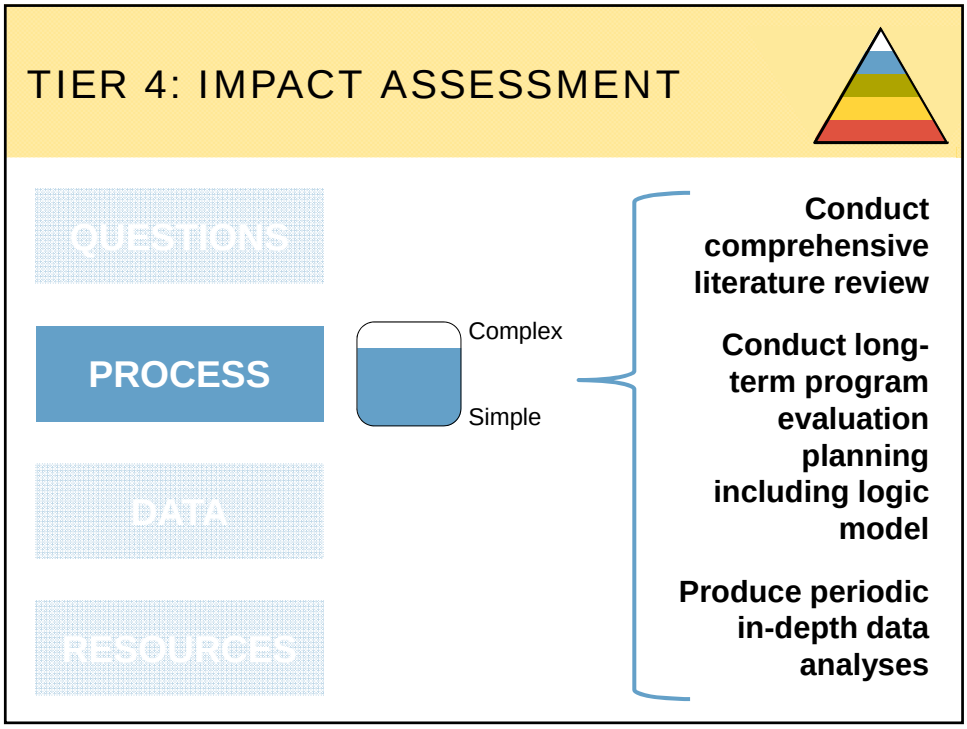
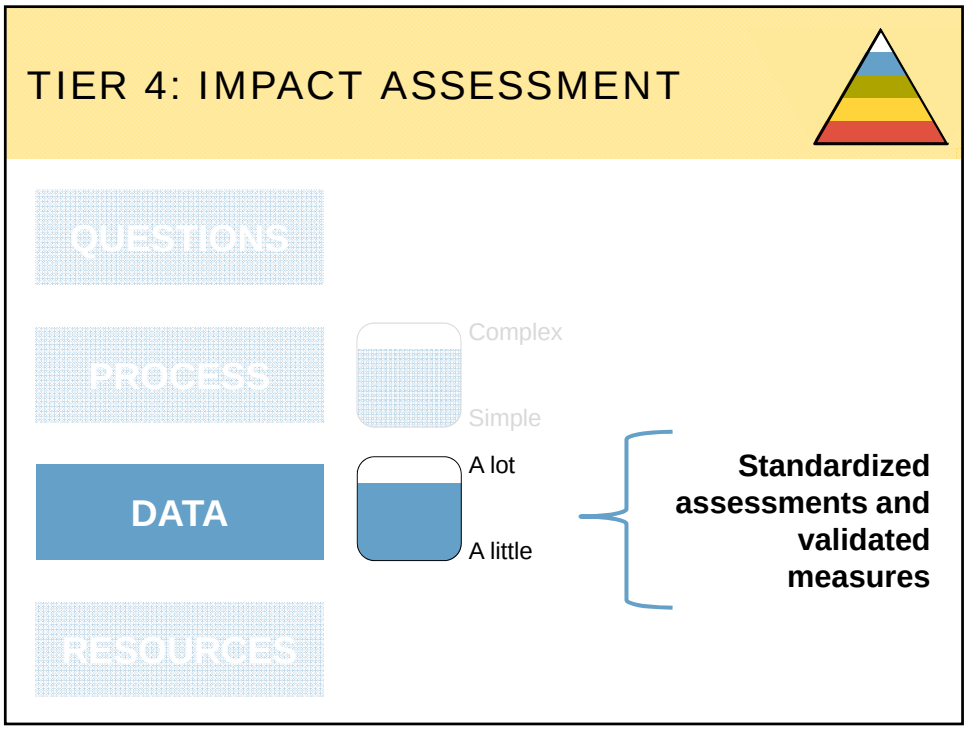

Tier 4:
... + Impact assessment
Tier 3:
Monitoring + Perceived effects + Observed effects
Tier 2:
Monitoring + Perceived effects
Tier 1:
Monitoring


TIER 4: IMPACT ASSESSMENT
QUESTIONS
PROCESS
DATA
RESOURCES
What long-term changes, if any, have occurred among participants as a result of the program?





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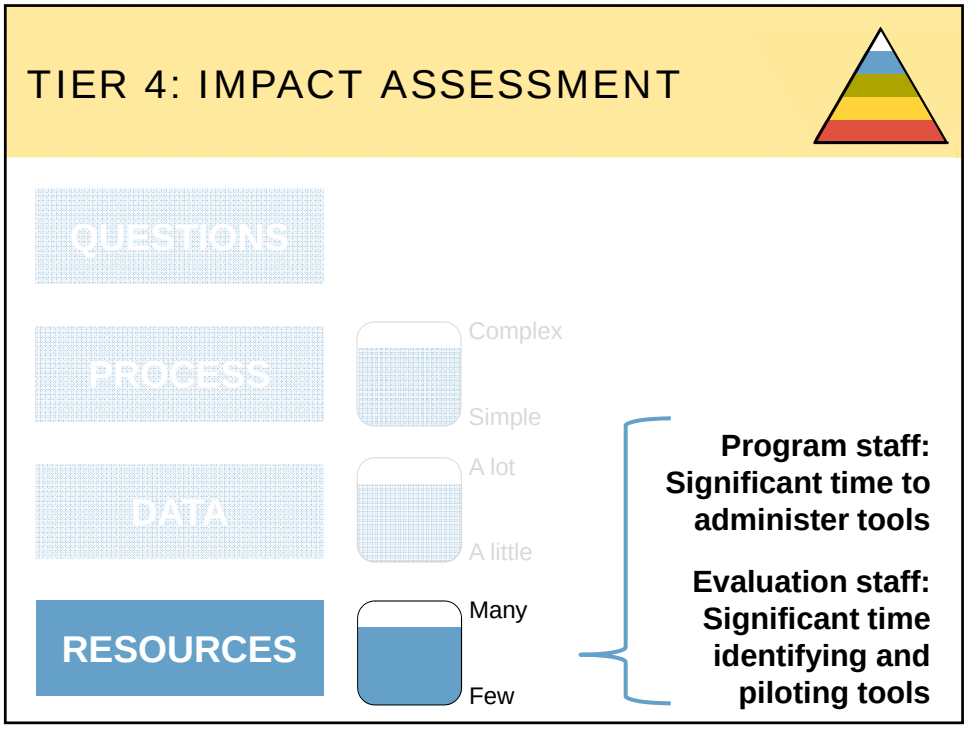

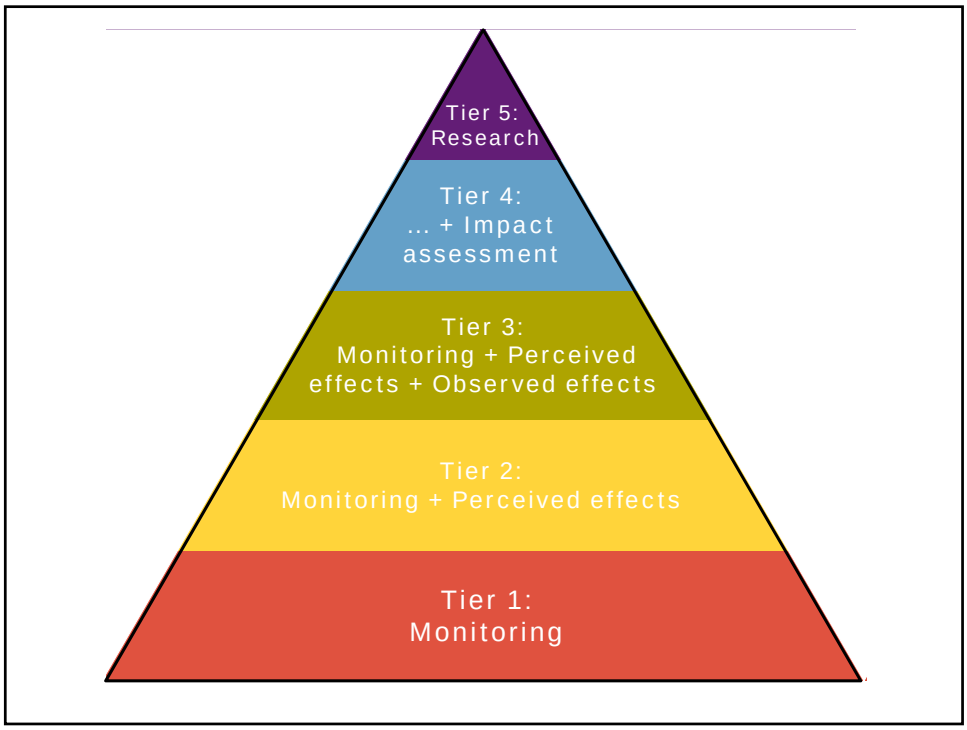

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TIER 5: RESEARCH

QUESTIONS

PROCESS

DATA

RESOURCES

What does this implementation suggest about the efficacy of this kind of intervention for similar populations?

Should this program be positioned for replication?

TIER 5: RESEARCH

QUESTIONS

PROCESS

Complex

Simple

DATA

RESOURCES

Collaborate with an academic partner, under the approval of an IRB

Rigorous study design

Collaborate on publication of results

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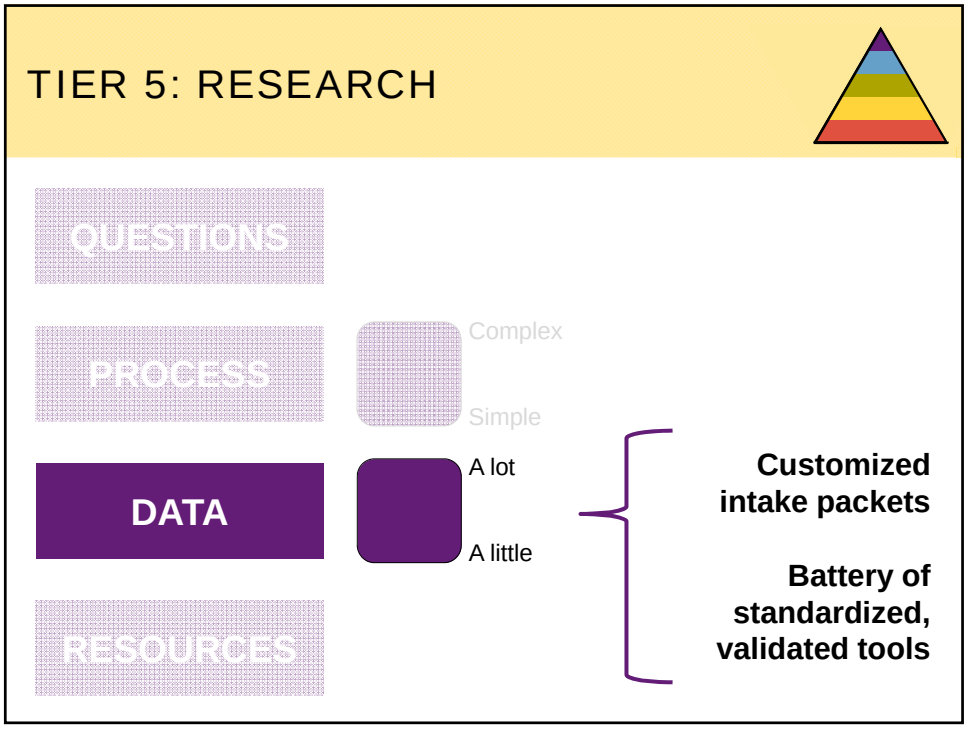

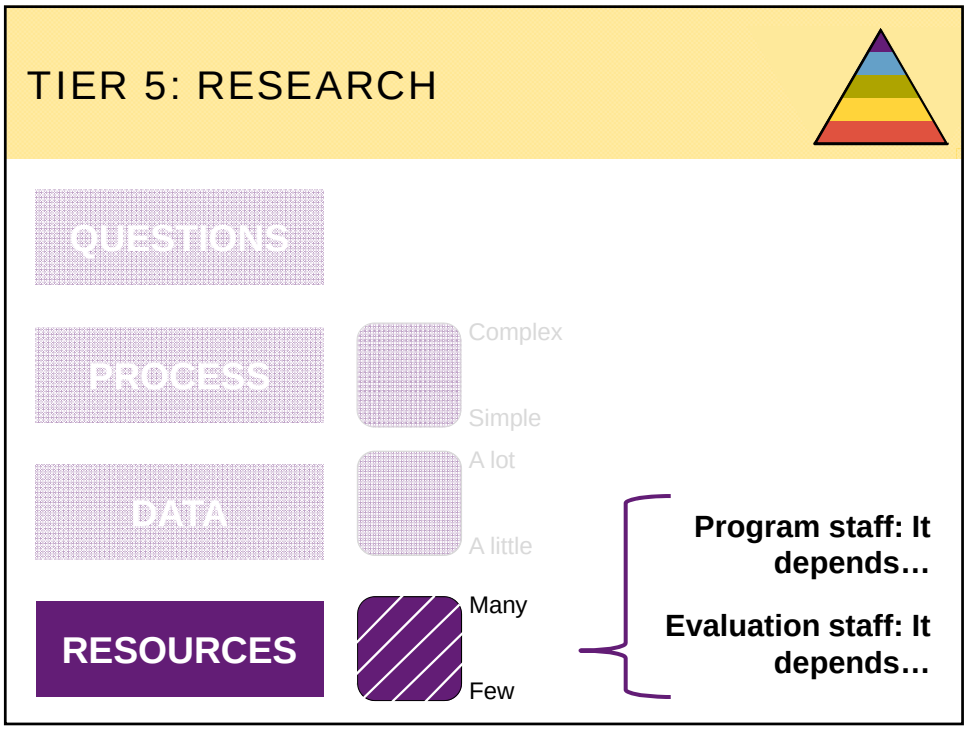

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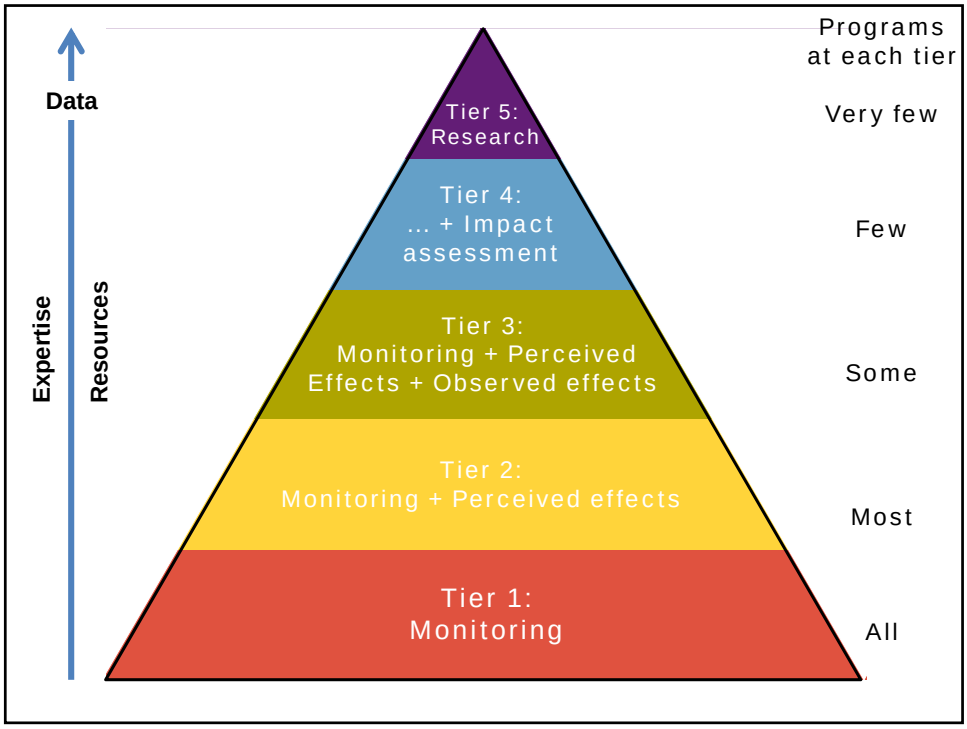

IMPLEMENTATION PROCESS

Step 1: Obtained feedback from agency leadership and Advisory Committee

Agency leadership

Evaluation professionals

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IMPLEMENTATION PROCESS

Step 1: Obtained buy-in from agency leadership and Advisory Committee

Step 2: DEL met with internal stakeholders to reach consensus on appropriate tiers for each program

Agency leadership

Foundations

Program managers

Criteria

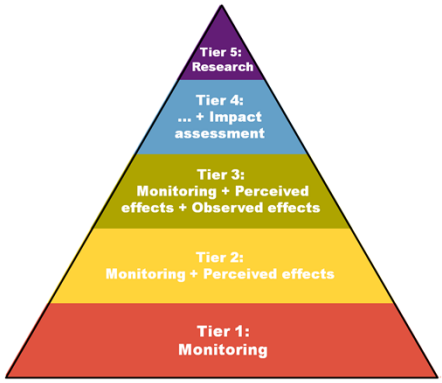
- Reporting
- Operations
- Learning

IMPLEMENTATION PROCESS

Step 1: Obtained buy-in from agency leadership and Advisory Committee

Step 2: DEL met with internal stakeholders to reach consensus on appropriate tiers for each program

Step 3: Look at overall distribution of programs across tiers; re-allocate based on resources



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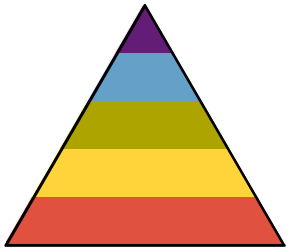
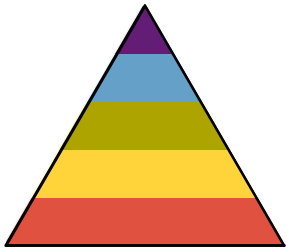
HOW "TIERS" IS WORKING SO FAR



Benefits:

- ✔ **Shared vocabulary facilitates discussions (both inter- and intra-departmental)**
- ✔ **Tiers make assumptions explicit to enable long-range planning**
- ✔ **Process emphasizes *mutual* resource allocation**

CHALLENGES



Challenges

- ? **Not all programs fit neatly into one tier**
- ? **What's the right time-scale for revisiting and revising tier assignments**
- ? **Some programs need remedial work just to get up to a decent Tier 1**
- ? **It's a LOT of work to do high-quality monitoring, let alone outcomes evaluation**

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KEY TAKEAWAYS

1. **Have a systematic process for evaluation management.**
2. **Don't be afraid to stop at whatever tier is most appropriate for the program.**
3. **Remember – the higher the tier, the more resources needed!**

QUESTIONS OR COMMENTS?

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