PINK TRUMPET

The Nuts and Bolts of Nonprofit Program Evaluation

Don't know where to start? This presentation is meant to provide you with the tools to begin your journey around assessing your nonprofit program's impact.

Hawwa Muhammad
Founder & CEO

My Objectives

- Explore key concepts and terminology in program evaluation

- Learn the steps for planning, analyzing, and improving your evaluation

- Address challenges and barriers to program evaluation

- Identify evaluation methods and tools

- Foster discussion and participation

- Help you make a compelling case to your organization or teams to start evaluating programs

Disclaimer: Unintended side effects may result in challenging program staff to develop a culture around program evaluation (Don't say we didn't warn you!)

A group of five women in varying skin tones; three women are seated at the table and two women are standing at the table

About Me

Social Impact Consultant

Worked with 10+ nonprofits for 13 years to write and secure grants, build evaluation tools and surveys, and create communications materials

My favorite evaluation type: Process Evaluations

Masters in Public Administration, Bachelor of Arts in Political Science, Rutgers University

Woman with brown skin in a pink shirt sitting on a blue couch in front of a plant

Who This is For

Program Evaluation Staff or Consultants starting out in the space

This presentation will help give you a framework or validation in how you are thinking about your roadmap or process for collecting data.

Executive Directors

For executive directors who may be interested in identifying ways to support program staff to create a stronger foundation for impact measurement.

Nonprofit Board Members

Board Members who want to help program staff think about new and potentially cost-effective ways to start collecting data about the organization's impact.

Grant Writers

Grant writers who struggle with finding ways to talk about an organization's impact.

Nonprofit Frontline Staff

For those curious about building their knowledge in this area in order to play a greater role in this function within their organizations.

A Roadmap for today's discussion

What is Program Evaluation?

Planning Your Evaluation

Improving Your Evaluation

1 **2** **3** **4** **5**

Why is it important?

Analyzing Your Evaluation

Program Evaluation: What it's not

A series of surveys to measure community satisfaction with programs or services

One individual (not pictured) is holding a sheet of paper and appears to be seated next to two persons (also not pictured)

An occasional attempt to collect quantitative information about a program's progress

A group of five women with varying skin tones who appear to be having a meeting

A report outlining a program's strengths and weaknesses

An individual is holding a paper that appears to be a business report

Two hands are pictured here; one is holding a pen and pointing to what appears to be a business report

Program Evaluation: So, What Is It?

Evaluation is a distinct process, different from reporting to funders and other stakeholders. While reporting is largely an administrative task focused on accountability, evaluation is a strategic process focused on improvement. The evaluation process allows nonprofits to increase the effectiveness and efficiency of delivery of services (Minnesota Council of Nonprofits, 2023)

Why is this important?

In a 2010 survey of 415 US-based nonprofits conducted by Johns Hopkins University, 80 percent of nonprofit leaders called for the development of better tools to measure qualitative impact.

Not consistently auditing and evaluating your programs can undermine your mission

Program Evaluation can lay a strong foundation in your organization's storytelling efforts
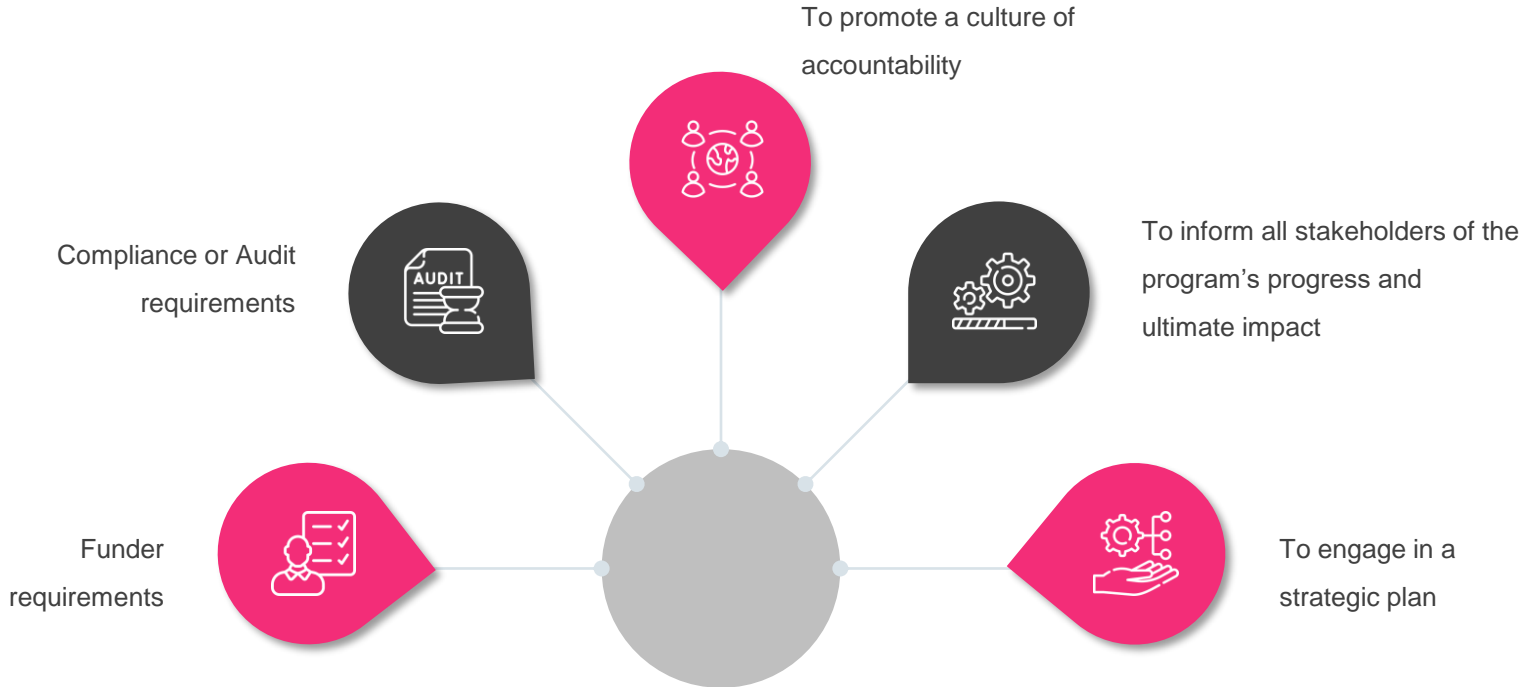

An aerial view of group of five people who appear to be seated at a table reviewing business reports

A group of four people seated in front of a whiteboard; a woman with brown skin is presenting at the whiteboard

Why might you need to conduct program evaluations?

To promote a culture of accountability

Compliance or Audit requirements

To inform all stakeholders of the program's progress and ultimate impact

Funder requirements

To engage in a strategic plan

So where do we begin?

Planning for Your Evaluation

Establishing a checklist

Checklist 01

Do I have a clear reason for conducting a program evaluation?

Checklist 02

What resources (technology, space, materials, time, finances, etc.) are available?

Checklist 03

What attitudes toward evaluation are present within my organization?

Checklist 04

Does the environment support change, accountability, and communication?

Checklist 05

Does the organization have a clear decision making and organizational structure?
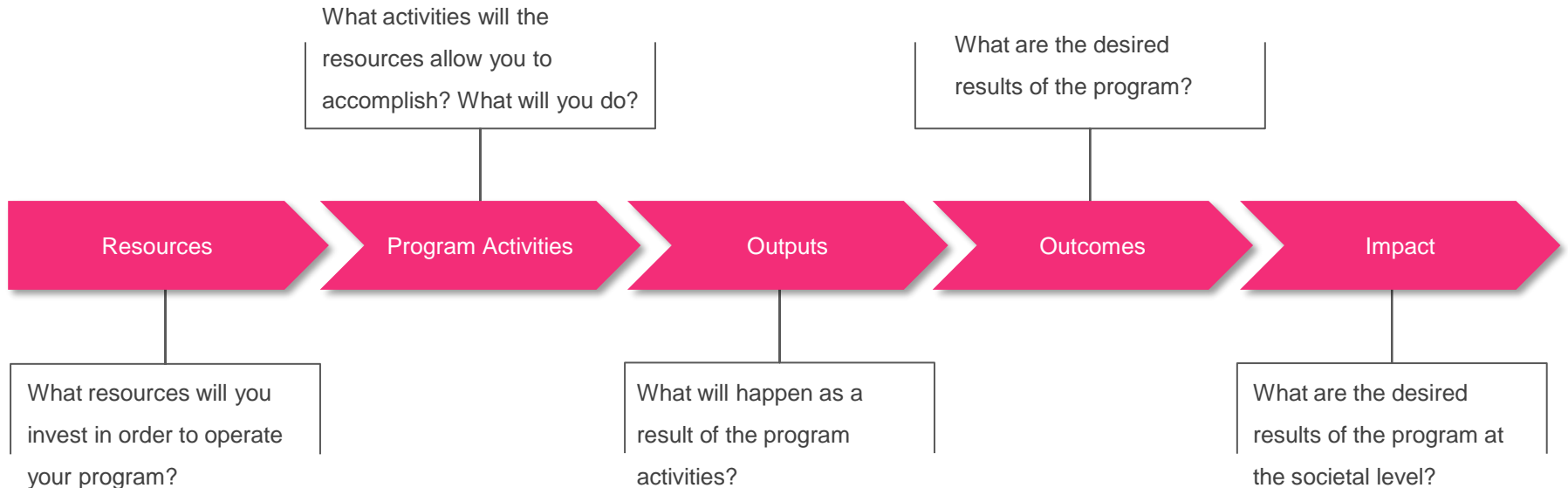
Checklist 06

Do I have champions and people to work with who will support this cause?

Step 1: Establishing a Logic Model

A logic model is a graphic depiction (road map) that presents the shared relationships among the resources, activities, outputs, outcomes, and impact for your program.

Key components of a logic model (resources or inputs, activities, outputs, outcomes) Steps for creating a logic model (brainstorming, refining, finalizing)

What activities will the resources allow you to accomplish? What will you do?

What are the desired results of the program?

| Resources | Program Activities | Outputs | Outcomes | Impact |

What resources will you invest in order to operate your program?

What will happen as a result of the program activities?

What are the desired results of the program at the societal level?

Developing a Logic Model

Here is a sample logic model for a food pantry program

Resources	Program Activities	Outputs	Outcomes	Impacts
Food donations	Food collection and inventory management	*Number of food boxes distributed*	Improved food security: One of the primary outcomes of a food pantry program is to improve food security among its participants. This means that participants have access to enough food to meet their basic needs and do not experience hunger or food insecurity.	Positive impact on participants: Participants may experience reduced stress and improved well-being, knowing they have access to food
Storage space	Sorting and packaging food	*Number of pantry visits*	Improved health: Access to healthy food items can lead to improved health outcomes among participants. This includes lower rates of diet-related diseases such as obesity, diabetes, and heart disease.	Positive impact on volunteers: Volunteers who participate in the program may experience a sense of satisfaction and fulfillment by helping those in need. They may also develop new skills and knowledge related to food security, nutrition, and community engagement.
Refrigeration and freezing equipment	Volunteer recruitment and management	*Demographic information of pantry participants: (the number of participants in the food pantry program broken down by age, gender, race, income level, and other demographic factors*	Improved financial stability: By providing food assistance, the food pantry program can help participants save money on groceries and other expenses, which can improve their overall financial stability.	Positive impact on the community: A food pantry program can positively impact the community by reducing food insecurity and hunger rates, promoting healthy eating habits, and creating opportunities for community engagement and volunteerism.
Transportation	Distribution of food	Volunteer hours	Increased community engagement: The food pantry program can serve as a hub for community engagement by bringing together volunteers, donors, and participants to work towards a common goal of reducing food insecurity.	Positive impact on the environment: By collecting and distributing excess food items that would otherwise go to waste, food pantry programs can help reduce food waste, contribute to a more sustainable food system, and reduce the carbon footprint associated with food production
Volunteer support	Nutrition education and counseling	Partnership type and number of partnerships established (e.g., number of schools served)	Reduced waste: By collecting and distributing excess food items that would otherwise go to waste, food pantry programs can help reduce food waste and contribute to a more sustainable food system.	Positive impact on donors and funders: Donors and funders who support the food pantry program can feel good about their contributions, knowing they are making a positive impact on the community.

Easy right? So now what's next?

Step 2: Take an Inventory: What data am I already collecting?

Here are sample data collection efforts from a workforce development program.

Data	Touchpoint	How often is this collected?
Name	Intake session #1	Once
Ethnicity/Race	Intake session #1	Once
Age	Intake session #1	Once
Job Status	Intake session #1 and Final intake session	Twice
Current Income	Intake session #1 through Final intake session	Six Times

Step 2: Identify The Type of Evaluation You Need

Formative Evaluation

The purpose of formative evaluation is improved or strengthen the implementation of a program or initiative.

Summative Evaluation

The purpose of a summative evaluation is to show whether the program has achieved its intended outcomes. Summative evaluations are conducted near, or at the end of, a program or program cycle.

Process Evaluation

Process evaluations document the process of a program's implementation. Process evaluations help stakeholders see how a program outcome or impact was achieved.

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Step 2 (continued): Identify The Type of Evaluation You Need

Outcome Evaluation

Outcome evaluations assess the effectiveness of a program in producing change. Outcome evaluations focus on difficult questions that ask what happened to program participants and how much of a difference the program made for them.

Outcome evaluations assess the effectiveness of a program in producing change.

Impact Evaluation

An impact evaluation relies on rigorous methods to determine the changes in outcomes which can be attributed to a specific intervention based on analysis.

Cost-Benefit Analysis

An effective true-cost analysis accurately allocates direct as well as indirect costs across focus areas such as programs, geographic sites or particular products, allowing nonprofit leaders to make more informed decisions about strategy and funding.

Analyzing Your Evaluation Efforts

Step 3: Determine your Methods of Program Evaluation

Quantitative methods (surveys, experiments, quasi-experiments)

Surveys work well when you know the right questions to ask, how to ask them, and to whom to ask. Surveys can usually collect data efficiently from a large sample and are good for answering the question of "how many."

Qualitative methods (interviews, focus groups, case studies)

Interviews can be used early in the research process to better understand an event (such as in a phenomenological study or case study) or later in a research effort to better understand the motivations or reasons behind actions or attitudes in experiments and surveys. In this sense, interviews can complement surveys and focus groups to better understand a phenomenon.

Mixed methods approach (combines quantitative and qualitative)

Common Data Collection Methods

Source: Measuring U, Jeff Sauro, October 2015

Method	Typical Sample Size	Hypothesis	Primary Analysis	Analysis Method	Focus
Survey	Small to large 30- 1000+	Formed	Quantitative	Descriptive & statistical	How many
Experiment	Medium to large, based on effect size; 3	Well-formed and testable	Quantitative	Experimental & statistical	Establish causation
Observation	Depends on Unit of Analysis (but 3-30)	None	Qualitative	Transcription & coding plus document and artifact review	What and where it happens
Interview	1 to 2	None	Qualitative	Transcription & coding	In-depth "why"
Focus Group	5-10 per group	Open	Qualitative	Transcription & coding	Uncover and explore ideas

Let's practice!

How can we approach program evaluation in these scenarios?

Case Study #1: Maria is a Program Manager at an afterschool nonprofit program. The program is thinking about piloting a new tutoring series that pairs high school students with volunteer online tutors to help improve their math skills. If this program is successful, Maria would like to work with the nonprofit program staff to appeal to funders for support. At the moment, Maria does not have funding to carry out this pilot.

What type of evaluation might be best for Maria?

What type of data collection tool should she use?

Evaluation type	Guiding Questions
Formative	How can we strengthen this program or initiative?
Summative	Have we achieved our impact?
Process	Did we use the right processes to achieve this program's impact?
Outcome	How effective was the program in producing change?
Impact	How can I tell what outside variables played a role in the program's impact?
Cost Benefit	Did we allocate resources in the best possible way to support the mission?

Data Collection Tools	Focus
Survey	How many
Experiment	Establish causation
Observation	What and where it happens
Interview	In-depth "why"
Focus Group	Uncover and explore ideas

How can we approach program evaluation in these scenarios?

Case Study #2: You are leading a new foundation focused on funding projects that train healthcare workers in rural communities across the U.S.

What type of evaluations would you ask potential grantees to conduct?

What type of data collection tool would be helpful for you to see in determining what to fund?

Evaluation type	Guiding Questions
Formative	How can we strengthen this program or initiative?
Summative	Have we achieved our impact?
Process	Did we use the right processes to achieve this program's impact?
Outcome	How effective was the program in producing change?
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Data Collection Tools	Focus
Survey	How many
Experiment	Establish causation
Observation	What and where it happens
Interview	In-depth "why"
Focus Group	Uncover and explore ideas

How can we approach program evaluation in these scenarios?

Case Study #3: Alex is the executive director of a nonprofit organization that promotes workforce development by providing upskilling in digital and financial literacy. This is Alex's second year in the role and the organization is struggling to figure out how their curriculum is impacting participants. Surveys are not instituted regularly because the completion rate is historically low.

What type of evaluation might be best for Alex?

What type of data collection tool should Alex use?

Evaluation type	Guiding Questions
Formative	How can we strengthen this program or initiative?
Summative	Have we achieved our impact?
Process	Did we use the right processes to achieve this program's impact?
Outcome	How effective was the program in producing change?
Impact	How can I tell what outside variables played a role in the program's impact?
Cost Benefit	Did we allocate resources in the best possible way to support the mission?

Data Collection Tools	Focus
Survey	How many
Experiment	Establish causation
Observation	What and where it happens
Interview	In-depth "why"
Focus Group	Uncover and explore ideas

Common Pitfalls in Program Evaluation

1. Viewing evaluation as a one-time event

2. Over-reliance on quantitative data

3. Not asking nuanced questions within the evaluation process

4. Neglecting stakeholder involvement

5. Not asking culturally competent questions

6. Not understanding your audience and what they want to understand

7. Failure to analyze and use evaluation findings

8. Not learning from evaluation outcomes

9. Neglecting stakeholder involvement

10. Lack of clear evaluation goals and objectives
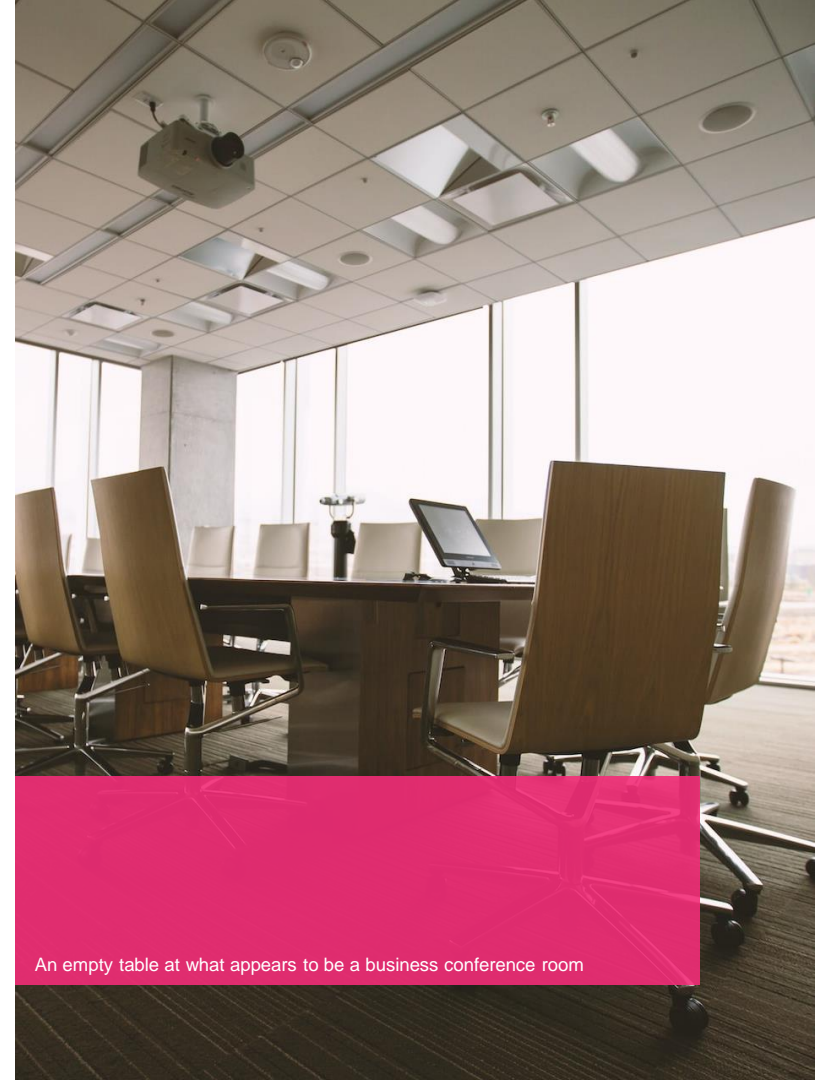
An empty table at what appears to be a business conference room

Overcoming Common Pitfalls in Program Evaluation

1. Viewing evaluation as a one-time event

2. Over-reliance on quantitative data

3. Not asking nuanced questions within the evaluation process

4. Neglecting stakeholder involvement

5. Not asking culturally competent questions

6. Not understanding your audience and what they want to understand

7. Failure to analyze and use evaluation findings

8. Not learning from evaluation outcomes

9. Neglecting stakeholder involvement

10. Lack of clear evaluation goals and objectives

Think it Through + Talk it out: Do you have an evaluation plan? Revisit your program evaluation plan frequently and listen to the stories you are hearing in your analysis of the data.

Think it Through: Does your team have a sense of who will review the data and the questions they may have about the topic you are presenting?

Think it Through + Talk it out: Are you reviewing outcomes and discussing this with your teams? Do you have a clear plan for what you will do with the data before collecting it?

Improving Your Evaluation Efforts

Taking a consistent audit of your organization's Strengths, Weakness, Opportunity, and Challenges (SWOC) will help to improve your organization's evaluation tools.

SWOC Topic	WHAT	ACTION STEP	WHO	BY WHEN
Strength	We have a data specialist	Talk to our data specialist about her experience, what she needs to succeed, and provide her with training and resources		November 1
Weakness	We don't collect follow-up data.	Develop a short follow-up data collection tool and corresponding SurveyMonkey survey. Raise money to provide a drawing for participating. Send to loan clients in January via email.		November 18 - Develop tool December 10 - Build in SurveyMonkey January 5 - Send to Loan Clients
Opportunity	We know of a funder who is interested in impact measurement.	Reach out to the funder to request information about any grants or funding they provide for developing impact measurement systems.		November 18
Challenge	Not able to make time for data entry	Work on developing an office procedure in which all staff participate in data entry every Friday from 9 -:30 am.		November 1 - Implement Procedures

Adapted from the U.S. Department of the Treasury CDFI Fund

Recap

- Program Evaluations are unique and tailored process that allow nonprofits to increase the effectiveness and efficiency of delivery of services

- Program Evaluation can be used to take an inventory of an organization's entire ecosystem and begin building an inventory of the organization's existing data

- Program Evaluation can be an effective tool for storytelling

- Ensure that your evaluation tools integrate a level of cultural competence

- Program Evaluations must be continuously refined and made better

Questions?

Resources

Tools and Resources for Assessing Social Impact (TRASI) database - a project of the Foundation Center developed in partnership with McKinsey & Company and experts in the field to address the growing interest in measuring the impact of social investments.

Sources cited

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- Process Evaluation vs. Outcome Evaluation, TSNE, June 2018

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- Three types of Evaluation for Nonprofits, Connecting Evidence, May 2020