

Episode 15: Evaluation – Measuring What Matters

Released: November 12, 2020

This is a transcript of Nancy Bacon, Sarah Brooks, and JoAnn Crabtree talking about fundraising on the Nonprofit Radio Show podcast. You can listen [here](#) or however you prefer to listen to podcasts.

Nancy Bacon

Hello, and welcome to the Nonprofit Radio Show a podcast with tips and tools for small nonprofits. If you feel in the dark about how to run a nonprofit, sunshine is on its way. I'm Nancy Bacon. And I'm joined by Sarah Brooks and Joanne Crabtree, and this week we're talking about evaluation, measuring what matters.

You know, as nonprofit organizations, we're here to make a difference. How do we ever know if we've been successful? You know, we know we have to do evaluation, it shows up on that grant form. Oh, they asked us five different ways on how we're going to measure our success. So, let's think now about how we're going to figure out our evaluation system so that we have good answers when we need them.

Sarah Brooks

This is a super important topic, Nancy, because I think we need to acknowledge that oftentimes, in the nonprofit sector, we do work that's hard to evaluate. It's hard to measure whether we're moving the needle just a little or a lot on big, deep, complex problems. So I'm looking forward to unpacking how we might know we're making a difference.

Nancy

Isn't it a topic that so many of us just absolutely dread? Let's see if we can break this down a little bit. So, I have three things that I think about when I think about evaluation. The first is, why are we evaluating? And you know, ultimately, I know some of you are thinking we're evaluating because we have to-- that grant funder says, we need to answer those questions. But ultimately, we're evaluating so that we can learn something-- we want to improve our process, improve the experience of our clients, or participants or whoever it is, who's involved in our programs, we want to, to learn how we can do our work better. We want to learn if we're making a difference. And we want to communicate that authentically with the people who matter. So those are funders or community members, and, and all of that.

Sarah

I think that's a really important point, Nancy, and we should just sit with that for a minute -- That we should evaluate what we're doing so that we can learn as an organization, and do better. Too often in the nonprofit sector, evaluation is about pleasing the funder. It's about

making sure your donors know their investments were worth it, or a grant funder feeling great about having given money to a cause. I think we need to stop thinking about it that way. And we need to start thinking about it as any investment that helps us learn how to think about complex social, and world problems is worth it. And so, we evaluate not to prove we did something good. We evaluate to learn. We evaluate to say, okay, we've added to a body of knowledge. And even as a small or rural nonprofit, we can be adding to a body of knowledge about those important problems that we're all trying to solve.

Nancy

I think it's important to keep in mind what our overall objective is, in terms of what we're trying to accomplish. I was hearing recently the story of a hospital that was doing a whole lot of a certain kind of surgery, and they were tracking whether the surgeries were successful. And indeed, they were successful, immediately following the surgery, patients were thriving. Unfortunately, some period of time later, many of those patients were dying.

I think of a big event that I was involved in, and we were measuring how people were feeling about that event. And, and it turns out that, you know, roughly 52% of the people really, really enjoyed it. But honestly, a lot of people at that event really struggled with the keynote speaker. That keynote speaker said a number of things that were perceived as racist. So 52% of the people in the evaluation really loved it. But a smaller percentage of people were hugely disappointed and angered by that keynote speaker. That it turns out that the data was showing that predominantly white people thought it was a great event. But people of color had an entirely different experience. And so for me, that says that evaluation is a little more complicated than just saying a majority of people feel this way about something. You really need to break down the numbers and in some cases, center the minority perspective, because that's where you can really learn.

The second thing I think about an evaluation is what are you evaluating? We all have heard these words: outputs and outcomes. And so, you think about there are those outputs, those just numbers, how many people came, what number of people was this or that in terms of demographic information? The second one is actually more interesting and those are outcomes and typically those show up as percentages. So, percentage of people who implemented whatever you taught them, percentage of people who returned to a natural environment because they participated in an environmental program, or percentage of people who change their perception about some public health issue.

And the third thing is really impact -- that long term change. So, you have outputs, numbers, outcomes, percentages, and impact, long term change.

Sarah

One of the things that I think we often fail to think about is that if we're going to provide any information on outcomes, or long term impacts, we have to be really thoughtful about the questions we're asking before we start the program. All of those kind of require a baseline, I come into this feeling this way. And I come out of this feeling that way. If we don't ask that

question, when they come in, and we ask them just to reflect later, did your perceptions change? I'm not so sure it's reliable. But if we ask people, when they come in at the beginning, a series of questions, and then a different series of questions as they leave our efforts, we have an opportunity to really track that change over time. So, I think it's important for you to have a meeting about what you want to evaluate, so that you can be sure you're asking those pre-questions to get you to the post-answers you want to be able to share.

Nancy

And so, what you're really speaking of is not just a meeting, but several meetings. So, having a strategy around evaluation where there's a through line throughout the year, right? So, you have what are we going to look for this year in terms of markers of success? What are we going to look for in terms of what we really want to learn about our programs and having a strategy around that.

JoAnn Crabtree

Having a long term strategy is really important, because so often, we just think about the particular event or program we're working on at that time. So without a comprehensive plan, you cannot put those pieces of data together to actually see the big picture.

Sarah

And I think it's important to think about that big picture in terms of scale as well. Because as small nonprofit organizations, sometimes we feel a little embarrassed that maybe our work isn't making a huge difference, we read about a grant opportunity where millions of people are being served by something. And we sort of humbly think oh well what we're doing isn't that important in this body of work. And I want to remind us that what we do is important, and sometimes scale can be quite small and still hugely impactful.

I heard a fabulous story this week about a man named Shamarr Allen in New Orleans, who is working on his own to give trumpets, to young children who bring him guns from their homes. And they told this amazing story of how he got to this idea. They interviewed him and at the end, they asked him how many guns had been turned in and how many trumpets have been given over? And his answer was four. And I stopped my car when I heard that. Because it's the first time I think I've heard a nonprofit story where the scale was four. And I so appreciated that NPR highlighted that story, that they recognize the value in changing four lives. And his answer to that question was four and if I have saved the life of one of those children, or if I have saved a gun experience from happening in one of those families, then all of this work has been so worth it. And I just want us to embrace the fact that our scale as small nonprofit organizations may not be moving the needle and solving homelessness, for example, for the country, but we're gonna learn something in the decisions and the choices and the way we set up our programs in our communities, that's going to add to that body of knowledge that's valuable. And it's valuable in our own communities, even if it only affects a few lives.

Nancy

It makes me think of the program I worked with where we, where we provided education and human needs support for 50 kids. And one of my funders was so excited about the depth of knowledge we had about those kids, the amount that we were really able to fundamentally change their lives. And some funders really can get behind that.

Sarah

Right. And remember, as a small nonprofit working in a smaller community, you have this ability to go beyond the number. When you serve 10 people, you can actually understand the impact it had on their lives and tell a richer, more full story, then a large program that's serving millions of people and sort of has to rely on statistics. So, we have a tiny superpower there in that we often know those we're serving and we can help tell the story of what the long term impact is.

Nancy

So, let's talk for a second about that data and that numbers and stories that we're collecting. I think one important rule on that is to collect what you can use. Sometimes we get so excited: Oh, it'd be so cool if we knew this, that and the other about the people attending our programs. We're really doing it for our own curiosity not necessarily to make any program decisions or to improve the process. So, being careful about how much we're collecting, so that we focus on the important information. It's also really important to think about where you, where you will store your data, that as people go out and gather numbers and stories, it's important that different people in your organization has access to those. I know I worked in one organization where we kept saying we needed to collect stories, but we didn't know where to put them. So, we created a Word file, and some of us used it, some of us didn't, we weren't always consistent on how we were collecting those stories.

Sarah

One little tip on that is just assign a person in the organization to be the story collector, and then make it a part of your organization's board meeting. There's no better way to make sure you're gathering stories than to have a moment where you're going to use them. So, if at every board meeting, you say: Hey, we need to have two or three stories from our mission this month, let's share them. Have one person, collect them and then share them out--it creates a real system. And sometimes that's the best thing you can have to keep it consistent.

Nancy

Great idea, you know, evaluation is often not funded. So, if you are time and staff limited, as we know, most nonprofits are, consider three bare bones measurements. And these can be in your board dashboard or your staff dashboard. But just three bare bones ways of knowing whether you're moving forward. Have a number-- that might be participation, diversity of people, something like that. Have one percentage change in behavior, change in implementation of some idea. And, have a story, a story of impact.

A challenge to you is to skip the Likert scale. So, we often have surveys that are you know, on a scale of one to five, how did you feel about today's program. And when you skip that, they

don't really mean so much, you have a lot richer data, if you provide a multiple choice selection. So rather than a scale, you give a choice of three, four or five options, and having the specificity of that multiple choice will not only be a good exercise for you to figure out what you're actually wanting to learn, but it helps get better data in the end.

Sarah

It also helps you continue that theme we've talked about before of making sure that words and choices you're using reflects the values and personality and tone of your organization. You can imagine a valuation questionnaire that's quite formal. And you can imagine one that's quite casual. And the difference between the two leaves a lasting impression on your audience. And so, think about your evaluation in terms of also how do you want your audience to feel and respond to your organization as they answer those questions.

Nancy

I think an evaluation can be a great learning tool, because all of a sudden, you're being asked a question, and you're like, Huh, I don't know that much about that. That makes me curious. So your evaluation can be the start of a much larger conversation.

Our word of the week is learn. And that won't surprise you because we've been talking about learning all throughout. Evaluation is supposed to be a tool for us to learn. We want to accomplish something and we want our programs to be better. So, evaluation is what we have to help us learn if our approach is working, and how we can make it better.

Sarah

When I think of the word learn, as the daughter of two teachers, I feel about, I think about failure. My parents always instilled in me the idea that you really learn the most when you've failed at something when something doesn't work the way you wanted to. And I feel like in our nonprofit sector, we're really afraid of failure, we're really afraid to show a funder or a donor, or because we care so much about the mission and the people we're serving. We don't want to make a mistake, or we don't want to do a program that isn't absolutely perfect. But the truth is, we won't get to that perfect program until we learn from a whole bunch of mistakes. So, if you go into evaluation as a, knowing it's going to help you find the ways to make your work even better, then you'll be set up for success.

JoAnn

In order to learn, we need to make sure that our data is consistent between our programs and events. So, what we want to do is we want to think long term, what is it that we really can use to move our mission forward and make our work more impactful? In addition to consistency, we really need to make sure we're thinking long term -- what it is we're trying to accomplish with the data we collect and the stories we collect also. When we do that, though, we're thinking long term, what do we want to evaluate on a regular basis. Go and take a look at what we're collecting every year and say is this still what we need to know down the road? Whatever you build, when you're collecting data, make sure that it is representative of what your values are and what the needs of your audience are also.

Nancy

So imagine a headline in the newspaper five years from now you've been really successful. What statistics are in that article? That would be a great exercise for your staff and Board. Consider a dashboard of three measures. You know, evaluation is a great way for us to learn. You got this.

JoAnn

Thank you for joining us today. We hope you'll share this episode of the Nonprofit Radio Show with your colleagues, friends and family. Nonprofit Radio Show. Sunshine for small nonprofits. Tune in for our next episode on your favorite podcasting site or at NonprofitRadioShow.com. Nonprofit Radio Show is hosted by Nancy Bacon, Sarah Brooks, and Joanne Crabtree. Music composed by Riley Crabtree.

Transcribed by <https://otter.ai>