

# Building a Culture of Program Evaluation

The intersection of program evaluation and organizational culture is critical to understand. The ways in which your nonprofit organization feels and thinks about evaluation will dictate their attitudes and behaviors toward it. Is your organization doing evaluation because of a required mandate from funders or because of a desire to learn from the insights data provides?

**A clear definition of organizational culture:**

Organizational culture is a complex tapestry made up of attitudes, values, behaviors, and artifacts of the people who work for your nonprofit.<sup>1</sup>

**It is complex, right?**

Values and attitudes drive behaviors that make up the culture of an organization. For example, if an organization values data as a learning opportunity, it is likely to have a culture that embraces evaluation. If an organization does not value data, it will likely become a culture of compliance with regards to evaluation.

1. Kanter, Beth and Aliza Sherman. (2016) *The Happy, Healthy Nonprofit: Strategies for Impact without Burnout*. Hoboken, New Jersey: John Wiley & Sons

If you are an external evaluator, where do the programs you work with fit in relation to their culture of evaluation? It's important to understand where the organization falls along this spectrum before planning the work. Without that understanding, barriers and resistance will crop up as you trudge uphill to put program evaluation into motion.

If you're a nonprofit professional or internal evaluator, where does your program staff fall? They probably present a wide range of attitudes, from those who are enthused to those who are resistant.

The motivation to do program evaluation impacts how nonprofits successfully collect and use data. Do nonprofits feel mandated to collect data because funders require it or do they collect it to learn for continuous program improvement? Wherever a program lies along this spectrum impacts the ability to build a culture of evaluation which, in turn, affects its ability to successfully perform and use evaluation.

## A Culture of Learning vs. Compliance

### OLD SCHOOL: CULTURE OF COMPLIANCE

Do we really need to do surveys with everyone? I just don't have the time for this. Don't funders know we are making a difference? Do we really have to prove it?

#### BELIEFS:

It takes too much time and money. These beliefs keep an organization in a culture of compliance, and an unwillingness to engage in evaluation work.

### NEW SCHOOL: CULTURE OF LEARNING

Will this survey help us learn more about the impact we're making? Can we use the data to change our program design if needed? I want to be sure what we're doing is actually achieving our program goals.

#### BELIEFS:

Data are needed for continuous program improvement and accountability to stakeholders. These beliefs demonstrate an attitude of wanting data to learn, share, and grow.

# How to Shift People From Resistance to Willingness

## 1. VALIDATE

## 2. EDUCATE

## 3. COLLABORATE

### **Validate**

Validation is a communication tool that's important in any conversation. When someone disagrees, rather than disagree in turn, always validate the concerns. Common phrases include:

*"I hear you: program evaluation is an expensive undertaking."*

*"I understand why you feel that evaluation will take too much time."*

Reflecting their opinion, rather than refuting it, allows for people to feel heard. Validation works in a range of situations, from personal to professional.

### **Educate**

It is important to highlight benefits for the individual as well as for the organization as a whole. In this way, you can shift one person's beliefs toward valuing evaluation. It's not instant, but requires several conversations and the building of a relationship.

A common fear of evaluation is that data will show that a program is not meeting goals. As a result, staff could fear the loss of a job, at the extreme. Educating staff on the benefits of program evaluation will alleviate unspoken concerns and will increase positivity toward evaluation. Illustrate the need for data to learn whether a program is meeting goals and, if not, what kind of improvement plan is required.

**True story. I was working with an organization and emailed them the evaluation report before our meeting. They called to tell me, "The data are wrong."**

That raised my curiosity (and, honestly, my blood pressure). They had a two-year contract to coordinate a peer-learning cohort. All of the participants rated communications as low, and many stated they didn't understand the project, their role, and the expectations.

My client insisted that they do communicate with them, and therefore the data are wrong. They were very anxious about these results and did not want to send this report to their funder.

**First, validate.** “I understand your concerns about the data and that you believe you are communicating with the participants.”

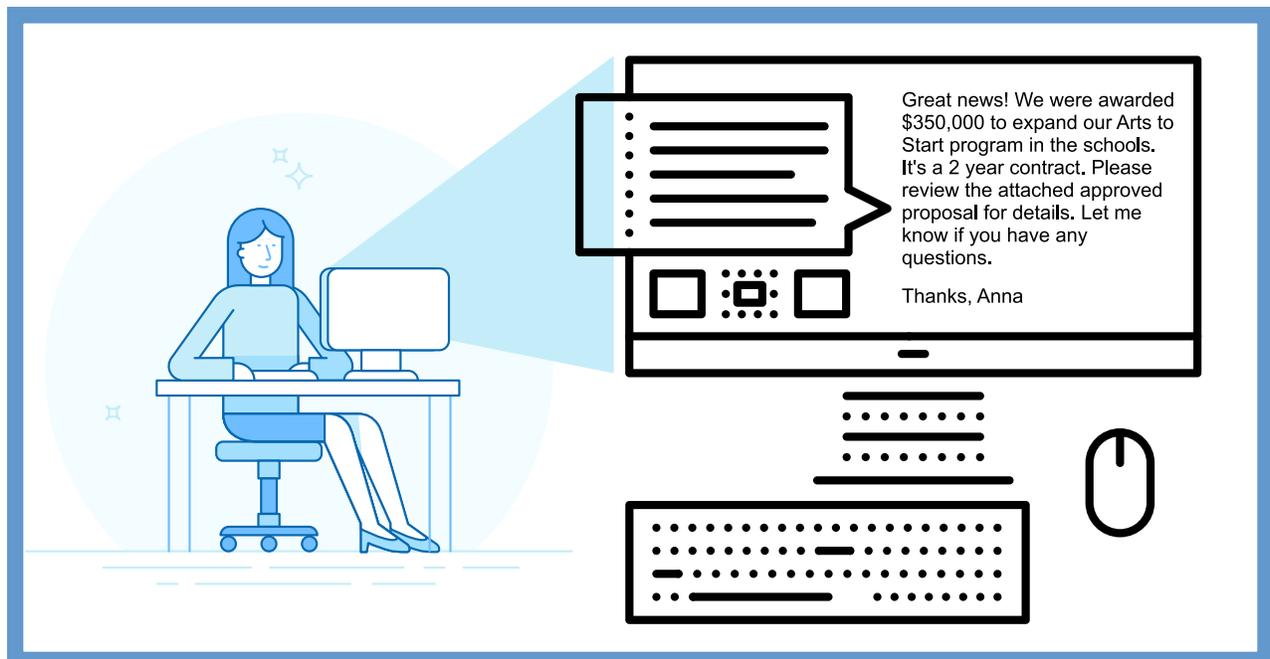
**Second, educate.** “The data are telling you to change the communication methods you’re using. Let’s talk about other communication methods that might work better in this situation. Then, we’ll write a one-page improvement plan highlighting what we’ve found and how you’re going to use the data to improve.”

This process talked them off the ledge, thankfully. The improvement plan and evaluation report were well received by the funder.

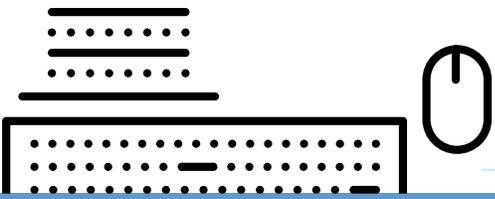
## Collaborate

Staff may be willing to do evaluation, but unable to collaborate. This disconnect typically occurs between the development and program staff.

Here’s a typical scenario between a grant writer, Anna, and a program director, Jonathan.



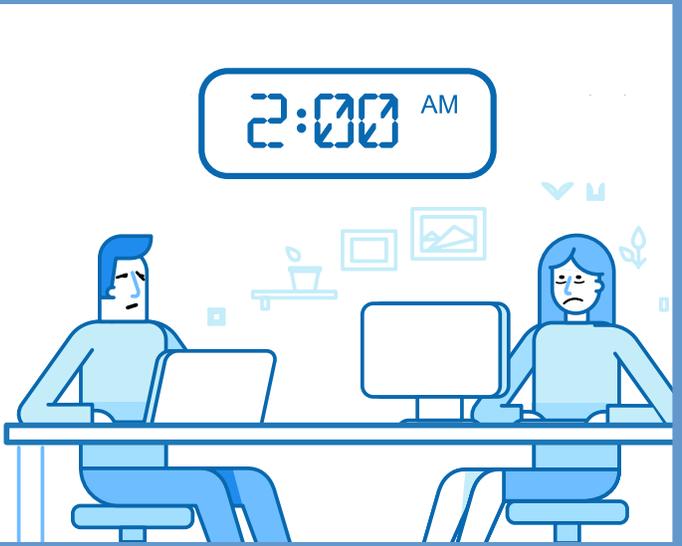
Anna,  
Wow! that's so great! The team is thrilled! Thanks so much, we'll get started on the expansion right away. You're a rock star!  
Jonathan



Jonathan...  
The funder report is due in **two weeks**. Can you please email me the data outlined in the proposal?  
Thanks,  
Anna



Anna, I am so sorry. I totally missed reading the evaluation section of the proposal. I don't have any data. What should we do?



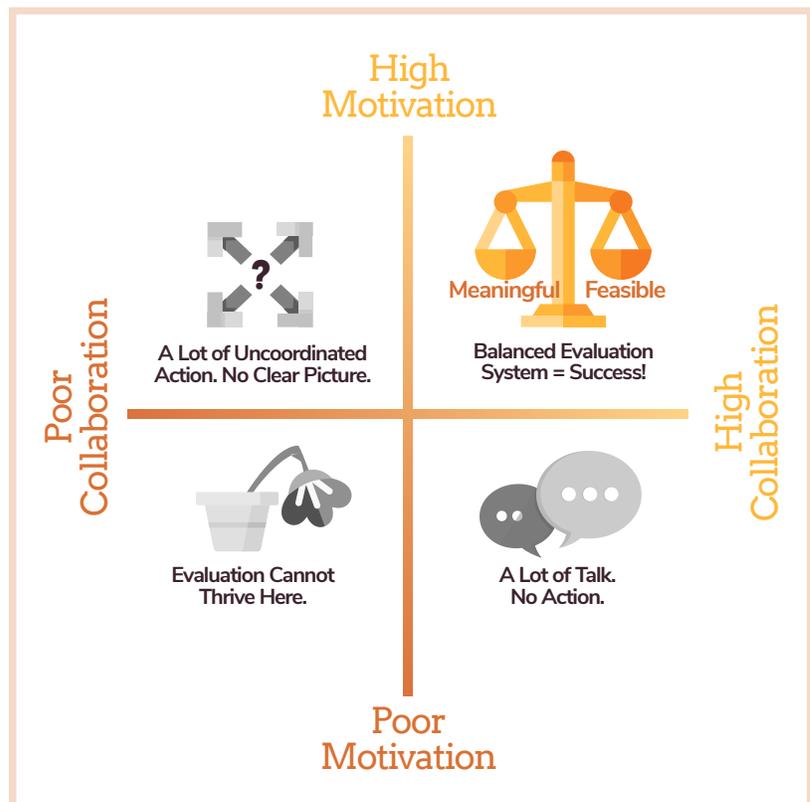
Why does this happen? They didn't collaborate. Evaluators along with program and development staff need to work together to define outcomes in the beginning of the process. An outcome is a change statement: what do you expect to change as a result of program activities? Sometimes, there is disagreement on what the outcomes should be. Development may want to use specific outcomes to secure funds, whereas program staff may say those outcomes are not realistic for data collection.

Compromise is a must. Agreement is also a must. Never create in a silo. Ever. And no communicating these pieces via email. Ever. Anna and Jon needed to meet in person and decide on outcomes that Anna can put in grant proposals. No more 2am reports!

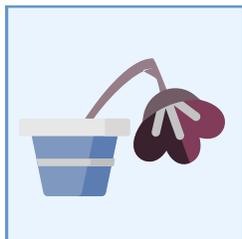
As an external evaluator, when I first start working with an organization, it is my job to ensure the outcomes are agreed upon by these two departments. As a result, development staff members know what outcomes are available to use to secure funds and program staff know what data to collect to support the development work, as well as having data to use for program improvement.

## Organizational Factors: Motivation and Collaboration

Two key organizational factors that influence program evaluation are: (1.) the motivation to do evaluation, and (2.) the structures in place for collaboration. The figure below illustrates four quadrants in which an organization may be classified. Think about where you fit, individually. Where does your program fall or, if you are an external evaluator, where does a program you work with fall? Once you know where you are on the spectrum, you can discuss how to move toward evaluation nirvana.

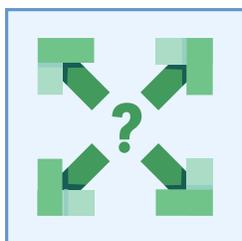


### **Low Collaboration. Low Motivation.**



If you are here, do not be discouraged. Choose one place to start – collaboration or motivation – and move forward from there. Always start small, expand, experience success, and then build from that progress..

### **High Motivation. Low Collaboration.**



The highly motivated organization has already recognized the value of evaluation work. The problem is, there are many chefs in the kitchen moving in different directions. Some may be doing surveys, others monitoring activities, with no coordinated approach or foundation for evaluation work. Typically, there is no plan for evaluation. The highly motivated data enthusiasts collect, manage, analyze, and report data independently of others. The lack of collaboration puts unneeded stress on colleagues and presents the potential for duplicating efforts. For example, an organization that serves youth may house three separate programs, each with its own program director and staff. Each program may then develop its own survey, measuring many of the same metrics. If they choose to collaborate, however, they can discuss where their outcomes overlap and generate one survey that serves the needs of all three programs. This approach is resource-efficient in terms of time and costs.

### **High Collaboration. Low Motivation.**



This organization likely has lots and lots of meetings, with many interesting conversations. However, no action occurs because there is a lack of motivation to do evaluation. In this case, it is important to have open and honest conversations as to why there is a lack of motivation. Then, shift the conversations to these questions: Do we want to know if we're making the difference we want to make? While we hear stories from our participants, how do we really know unless we have a formal structure in place? Do we want to learn, grow, and change to help the people we're trying to help? Can we align what will help us learn with what funders want to know? This means development and program staff will need to dive into this topic together.

Then, assign someone to be the project lead for this work and create a plan of action. The process can start with answering the questions above.

## Do you have more questions?

Are you ready to shift to a culture of program evaluation?

We provide one-to-one coaching, whole group trainings, and hands-on evaluation services.



Please visit  
[evaluationintoaction.com](https://evaluationintoaction.com)  
to learn more.

## “How In4All Built a Culture of Evaluation”

**Elaine Charpentier Philippi, Executive Director, In4All**

Building a culture of evaluation is not easy, but it is worth it! When it comes to working with your board of directors and staff, start with what you know to be true: given the choice, every one of them would want to increase outcomes for the populations your organization serves. From that posture, work to educate them in a way that is both meaningful and empathetic.

**The following are some successful strategies I used when building a culture of evaluation in my organization:**

### MANAGING UP

I was not the decision maker when our cultural shift began. Taking the posture of what I knew to be true, I began to reframe the language we used to talk about impact. When we talked numbers, I mentioned outputs. When we talked about the problem and where we felt we could affect change, I mentioned outcomes. Whenever I had the chance, I would push on our reports to reflect this language. It became obvious that we were an outputs-driven organization.

### DEMONSTRATING

One of the tools I used was a logic model. This model provided a visual roadmap that demonstrated the outcomes we should expect from a specific intervention. I built our program infrastructure from existing research defining the problem and feedback from our stakeholders on how our program could impact students. Whenever possible, back up your funding proposals with research – the data don't lie!

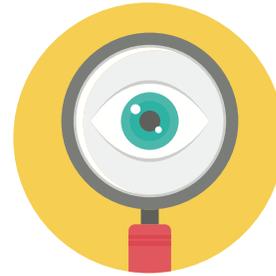
## Key Characteristics

These key characteristics/cultural identities are a handful of what you will notice when you adopt a culture of evaluation into your organization:



### **Action-oriented.**

You find you are actively seeking solutions to problems, while not acting for action's sake but to attempt to assess the effects of our actions.



### **Truth-seeking.**

The fear of not getting it right the first time dissipates, and you value mistakes as the learning opportunities they are. This stresses accountability and scientific credibility.



### **Forward-looking.**

Instead of reacting to situations as they arise, you begin anticipating where evaluation feedback is most needed and can plan for implementation as part of the process.



### **Ethical and democratic.**

You find your board of directors and staff are not interested in private ownership of and exclusive access to data and instead see it as an opportunity to contribute to best practice.

## Outcomes

In a noisy world with so many of us competing to be heard, outcomes are critical. They increase validity with all stakeholders and can boost funding from individuals, foundations, and corporations. As a nonprofit leader who believes it is my responsibility to maximize our contribution to community while sticking to our core values, my commitment to evaluation is two-fold:

1. **Outcomes bring life to my organization's unique value propositions and set us apart while contributing to change in community. AND ...**
2. **Outcomes help us understand when our programs begin LOSING impact in real time. This allows us to be responsive and adjust programming based on service user feedback BEFORE the funding model implodes.**

1. <https://www.socialresearchmethods.net/kb/evalcult.php>