

strategies to achieve social impact

Creating a Community of Learners in an Economic Recession

Imagine this: A foundation's directors, representing a variety of programs, gather to discuss their projects, evaluation approaches, and results. The group questions program objectives, considers evaluation methodology and makes recommendations for better aligning their methods, which they hope will lead to more compelling future results.

Talk turns to the economy. The directors share stories about programs that have been discontinued or abandoned altogether. They wonder aloud about the financial fitness of their own foundation. "Will we be able to continue our projects? How can we continue to support strong evaluation?"

Evaluation in tough economic times is not an oxymoron, as funders bring an even more critical eye to their grantees, ensuring that dollars are well-spent and creating the desired impact. Now is the time to emphasize building an organization's capacity for evaluation, becoming smart consumers of evaluation by effectively allocating the right resources, facilitating learning and developing existing assets within the organization.

Now is the time to become a *Community of Learners*.

Assess Where You Are

The **community of learners** model is an "asset based / asset building" model. It is designed to build capacity, develop a program-wide infrastructure, and influence an organization's culture toward data-driven decision making.

Organizational leaders should begin by asking questions about its readiness and capacity for evaluation: What is our existing learning culture? How is our data collected and analyzed? What data do we collect and how are they used? Do we translate data we currently collect into action?

Answering these questions is a starting place for determining: an organization's overall capacity for evaluation, how to build upon strengths, and how to establish the need for external consulting, technical assistance, and coaching to fill in the gaps.

With this in mind, an organization can place itself on a continuum of a community of learners and decide what evaluation activities it should be responsible for managing and coordinating and which require external assistance.

This type of assessment helps an organization allocate resources strategically to maximize internal talents. Decisions regarding evaluation and resource allocation should not be made based upon capacity alone, but rather on a blend of the right decision for the organization. An organization may have the capacity in a particular area; however, it may choose to enlist external support to maximize staff talents in a more strategic direction. For example, an organization may be at an emerging level in its ability to **develop evaluation tools**, but at a more advanced stage in its ability to **project manage** an

evaluation. As such, the organization may choose to enlist assistance around data collection development while maintaining the larger evaluation project management function in-house.

Evaluation Planning and System Design

includes the development of a conceptual model related to the organization's intended change — the reason it exists and how it intends to achieve its mission. While organizations often have the capacity to engage in evaluation planning on their own, the process is time consuming and often requires a third party to help negotiate varying stakeholder opinions. Additionally, many organizations appreciate the support of an external consultant to launch, coordinate and manage the effort to ensure that the final model is accurate, supported by all parties, and reflects the foundation upon which the organization will build its future planning.

Data Analysis generally requires targeted training, professional development, and opportunities for hands on learning. The community of learners approach to evaluation provides such learning; however, the application takes time to build the necessary confidence and the skill level for an organization to manage this task without external support which is why many organizations seek outside assistance. A third party consultant can provide data analysis, data interpretation, and reporting assistance, ranging from analytical tests to the more complex effort of assisting a nonprofit in understanding its findings relative to its theory of change, marketing, fundraising, and reporting needs.

insights

Data Collection Tool Design is another evaluation process for which nonprofits often seek outside assistance. While asking questions might seem easy, asking the "right" questions in a way that yields valid and reliable findings is not always straightforward. That said, many organizations already have a history of using a range of data-collection tools that have equipped them with an understanding of the most appropriate way to ask the questions. The **community of learners** approach provides opportunities to identify an organization's information needs and priorities and translates these into viable data collection tools. Further, it assists nonprofits in determining the most appropriate, feasible, and cost-effective data collection method to use (such as interviews, discussion groups, surveys, etc.) While some data collection decisions can be made during the evaluation planning phase, it is in the tool design phase that these decisions are implemented. From time to time, there are reasons to have third party assistance in collecting your data for reasons of objectivity.

Determine What You Can Do

Among the steps a nonprofit can take to launch and engage in a community of learners are:

- Develop an evaluation leadership team with representation from across your organization.
- Create a logic model or theory of change — There are a host of resources in the field to help you get started.ⁱ

- Articulate your information needs — What questions are funders asking? What questions are board members asking? What data are needed to know the program is working? What information would help your team make decisions about allocating scarce resources most effectively?
- Identify your current data and data sources — All organizations have data about their donors, their participants, their partners, and their financials. How to view these data does not always come easily. Looking at the data in a different light and aligning the data to a logic model facilitates understanding of the data's value, potential, and power.
- Map your current data to your logic model — Simply creating a spreadsheet and mapping data to each of the logic model components is the first step toward understanding existing data and serves as a starting place to address your evaluation questions.
- Use data to address information needs — Once the data and data sources are mapped, organizations can begin to address funder, board, and staff questions and further need for information.

When resources are tight and decisions must be made with regard to where to begin and how to engage in evaluation, we believe the **community of learners** is suitable for all nonprofit organizations.ⁱⁱ For more information about the Community of Learners approach to Evaluation, two recent briefing papers — "Creating A Community of Learners" and "Effective Nonprofit Evaluation Through a Community of Learners" — are available at www.tccgrp.com.

EVALUATING THE CAPACITY OF A COMMUNITY OF LEARNERS

		Division of labor: Client 0% — Consultant 100%		Division of labor: Client 100% — Consultant 0%	
		ENTRY	EMERGING	ADAPTING	TRANSFORMED
Project Management		Attend meetings	Coordinate & attend meetings	Manage communication process	Manage communication process and facilitate meetings
Design and Implementation		React to Evaluation design	Contribute Evaluation Design; Manage some evaluation tasks	Co-CREATE Evaluation Design; Manage some evaluation tasks	Create an Evaluation Design & manage implementation
Tool development		Provide feedback on evaluation tools	Offer ideas on types of tools and items within tools	Co-Develop evaluation tools	Develop evaluation tools
Results		Provide feedback on evaluation results	Help frame analysis & reporting	Assist in data analysis and reporting	Manage data analysis & reporting in/externally

ⁱ There are a host of resources in the field with regard to creating a logic model or theory of change. TCC recommends the following: 1) W.K. Kellogg Foundation (1998). *W.K. Kellogg Foundation Evaluation Handbook*. (Battle Creek, MI: W.K. Kellogg Foundation); 2) Grant Craft (2006). *Mapping Change: Using a Theory of Change to Guide Planning and Evaluation*; 3) Anderson, Andrea A. (2004). *Theory of Change: As a Tool for Strategic Planning*. (The Aspen Institute A Roundtable on Community Change); 4) York, P. (2005). *A Funders Guide to Evaluation: Leveraging Evaluation to Improve Nonprofit Effectiveness*. (St. Paul, MN: Field Stone Alliance).

ⁱⁱ If a "beginner" nonprofit is looking for a quick fix to an evaluation requirement or question, we do not recommend this approach (particularly if resources are scarce) since a typical beginner nonprofit requires significant support in some fundamental ways around evaluation approaches. Trying to circumvent this early learning generally results in inefficiencies and/or missteps along the way.