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Program Evaluation & Impact Measurement Guide

Community Impact Grant Program

Ecclesiastical Insurance is proud to support Canadian charities through the organization's signature Canadian giving initiative, the Community Impact Grant Program. This annual program is administered under the auspices of Benefact Trust, our charitable trust owner. It provides funding for registered Canadian charities looking to implement special projects designed to benefit youth, help at risk and underserved people, or support the preservation of Canada's history and diversity.

Grant submissions are reviewed by the Canadian Grant Giving Committee and are awarded based on the following criteria:

- A detailed description of the problem the non-profit organization hopes to address
- A clearly defined target population
- A detailed description of the project offered
- Scale and impact of the project upon the community or region
- The project's potential for long-term sustainability and success
- Project's innovation and creativity
- Diversity and inclusion
- Organization's ability to measure results and provide outcomes—types of data to be collected; data sources; method of data collection; timeline for data collection and analysis
- Project's cost-effectiveness and long-term financial soundness

The following provides a general overview of the language, key concepts, and stages used in Program Evaluation and Impact Measurement. It is designed to help non-profit organizations with the process and is based on a position paper developed for Ecclesiastical Insurance by Ghebray Consulting.

Program Evaluation and Impact Measurement: An Overview

Charity and non-profit organizations* play a vital role improving the conditions of the people/communities they serve and in meeting immediate needs. In today's environment, however, many non-profit organizations face the challenge of having to do more with less. At the same time, they are also expected to evaluate and demonstrate the extent to which their work achieves desired results. With these increased demands for accountability, many smaller, community based non-profit organizations lack the necessary staffing resources and/or capabilities.

What is Program Evaluation?

Simply put, program evaluation is how non-profit organizations gather information to measure the impact of their program/activities and demonstrate the effectiveness and value of their work. Program evaluation begins before the program is designed; it continues throughout the program's implementation; and it assesses final impacts at the end of the program.

Using various research methods and tools, Program Evaluation is a comprehensive effort and involves:

- Assessing community/individual needs. This needs assessment phase provides a baseline and enables the non-profit organization to define program goals/mission.
- Determining strategies and interventions to address identified needs—this is the program design phase.
- Monitoring the interventions deployed to determine if they are effective or need adjustment. Systematically tracking /measuring activities can be conducted periodically or on an on-going basis.
- Evaluating the resulting outcomes and impacts of individual program components, as well as the program's overall goals/mission.

Why is Program Evaluation Important?

Program Evaluation enables non-profit organizations to:

1. Promote learning and deepen their knowledge of what works, for whom, and why.
2. Determine if adjustments are required and guide program design modification.
3. Improve the effectiveness of their work/programs.
4. Determine if the organization's programs and mission are achieving their short and long-term goals.
5. Fulfill funding commitments by sharing information and data with stakeholders—including the organizations that provide funding—and, as a result, be in a better position to secure scaled-up resources.

What is Impact Measurement?

Impact Measurement refers to the process of systematically and regularly collecting data to understand the cumulative effect of a non-profit organization's work, or a specific program, towards a broader long-term outcome or impact goal. Impact Measurement helps non-profit organizations understand what is changing, when change is happening, and why and how it is happening. The term 'impact' refers to both long term 'intended consequences' as well as potential 'unintended consequences' that result from a non-profit organization's work over a set time period.

To effectively measure impact, a non-profit organization should:

- Clearly identify and describe the problem it hopes to address
- Clearly identify and describe the target population it aims to serve
- Have a clear and detailed description of programs offered
- Have realistic and measurable (quantitatively or qualitatively) outcomes

See Appendix A for a Glossary of Terms.

*For the purpose of this document, charity and non-profit organizations are referred to as 'non-profit organizations'.

Evaluation Approaches

Non-profit organizations can choose to evaluate by measuring two types of impacts:

1. '**Program-level impact**' which measures the contribution of specific programs or interventions (strategies, activities, outputs) to the broader mission.
2. '**Mission-level impact**' which measures how effectively it is advancing its broader mission and goals.

Since there are different ways to think about design and conduct evaluation, non-profit organizations should identify the approach best suited to their operational context. Examples include:

The '**Four-Level Model**' approach: Most often used to evaluate training programs, the key question is "What impact does the training have on participants in terms of their reactions, learning, behavior, and organizational results?"

The '**Goal-Free Evaluation**' approach: Focusing on the actual, rather than the intended impact of a program, the key question is "What are the effects of the program, including any unintended benefits?"

The '**Developmental Evaluation**' approach: Most appropriate for social change initiatives in complex or uncertain environments, data is collected in real-time and provides instantaneous feedback to program staff, facilitating a continuous development loop.

Program Evaluation Stages

Program Evaluation is a cyclical and continuous undertaking that typically includes several stages.

For example, a non-profit organization with a goal of addressing the low academic achievement of youth aging out of care, these stages would include:

Before Program Development: This is the first stage where needs assessment evaluation is conducted. The data collected during this stage helps the non-profit understand the problem and the individuals, group(s) or communities who are affected by it. In the above example, the data collected reveals that youth aging out of care have low academic achievements. Many do not graduate from high school, and/or many are unemployed or underemployed.

During Program Design: The purpose/goal of the program is articulated in this stage. Data collected helps the non-profit organization define program delivery strategies/interventions, as well as short and long-term outcomes. Based on the needs assessment evaluation in this example, a program can be developed to provide youth with both education and employment support designed to improve the rate of post-secondary enrollment, as well as access to good jobs.

During Program Implementation: This is the ongoing *formative*, or monitoring, stage. Detailed information collected in this stage helps evaluate if a program is being implemented as planned and if inputs/supports are working. This stage provides opportunities to determine necessary improvements and make course corrections.

Program Completion: This is when summative assessment is conducted. Data collected in this stage helps assess the program's overall effectiveness and determines if the intended immediate outcomes are being achieved. In the example of a program that provides education and employment support for youth aging out of care, the data collected will determine if these outcomes—e.g., graduation and improved employability skills—are being achieved.

Program Review: This is the stage where **Impact Evaluation and Measurement** are conducted. Data collected helps assess the program's broader, lasting impacts—the extent to which the outcomes achieved are contributing towards long-term goals. These findings can be shared with stakeholders and are often required by funding partners and grant providers.

Deciding What to Measure...

Deciding what to measure can be influenced by various factors, among them a non-profit organization's own learning needs, as well as its accountability to stakeholders.

With respect to program delivery, a well-designed program makes evaluation and measurement relatively easier. To effectively measure a program's impact, a non-profit organization should clearly identify and describe the problem it hopes to address, the target population it intends to serve, and have realistic and measurable outcomes (determined quantitatively or qualitatively).

With respect to accountability, a non-profit organization must determine if it is:

- Serving the intended target population
- Delivering the promised engagements
- Meeting its own program and/or sector program, delivery standards
- Meeting the expectations of those served (e.g. rate of satisfaction)
- Making a difference in the lives of those served
- Contributing to a broader impact

... Developing the Plan

If the goal of evaluation is to assess if a non-profit organization is serving the intended target population or delivering the programs it promised, the type of evaluation that would be conducted is **monitoring evaluation**, and the number and types of individuals served is what is measured.

If the goal of evaluation is to assess if a non-profit organization is meeting its own program delivery standards or meeting the program quality expectation of those served, the type of evaluation that would be conducted is **process evaluation**, and the rate of satisfaction of those served and achievement of program standards is what is measured.

If the goal of evaluation is to assess if a non-profit organization is making a difference in the lives of those served, the type of evaluation that would be conducted is outcome evaluation, and rate of change or level of improvement is what is measured.

If the goal of evaluation is to assess if a non-profit organization's work or a program is contributing to a broader impact, the type of evaluation that would be conducted is impact evaluation, and the level of contribution towards a broader impact is what is measured.

In a nutshell, an **Evaluation Plan** is a written document that describes how a non-profit organization will evaluate and measure the impact of its work or a program it offers. The plan clearly articulates the following:

- Type of the evaluation design
- Goal of evaluation
- Indicators or what is measured (e.g., type of data to be collected)
- Method of data collection (qualitative, quantitative)
- Timeline for data collection and analysis
- Persons responsible for data collection and analysis
- How evaluation data will be used and to whom evaluation findings will be reported

Selecting/Developing Indicators

Indicators are specific, measurable characteristics that indicate the changes and/or progress a program is making toward achieving a defined goal. Regardless of its size, a non-profit organization can look at three broad indicators to measure the overall impact of its work:

1. **Quantity & quality of resources or inputs deployed:**
   They might include the number of staff and type of expertise used; the number of volunteers recruited, trained, and deployed; and the number of facilities, equipment, and supplies utilized.

2. **Quantity & quality of its effort:**
   These indicators might include the number and types of programs or services delivered and the number and types of participants/clients served or engaged.

3. **Progression towards mission achievement:**
   These indicators focus first on the achievement of short-term outcomes and then on long-term outcomes/impacts to determine if those served are better off.

See Appendix B for a case study on selecting indicators.

Data Collection Tools

Once an evaluation plan is in place, a non-profit organization must establish a specific tool or tools to gather data on the indicators it has identified. Non-profit organizations can adopt or adapt data collection tools from existing ones that have been used in their field, or design one from scratch. In either case, it is important to ensure the appropriateness of the data collection tool and its ability to measure the intended indicator/s reliably and accurately.

The most common data collection tools are surveys, questionnaires, focus groups, interviews, and direct observation. Survey questionnaires administered in person or online are more appropriate for quantitative data, whereas focus groups, interviews and direct observation are suitable for qualitative data. The most important thing to remember is that questions should be worded simply and clearly.

Sampling Plan

Depending on the scope of evaluation, a non-profit organization doesn't necessarily need to collect data from every individual it serves or engages. A sampling plan can be used to get a representative sample from those served. Sampling plans refer to the way individuals are selected to participate in evaluation. For a non-profit organization that serves 2,000 young people, collecting data from a representative sample of 600 would be appropriate.

See Appendix C for measurement examples.

A Final Note

Program Evaluation is undertaken worldwide by 'for-profit' as well as 'not-for-profit' organizations. The chosen approaches and methodologies are based on the organizations that are undertaking the 'evaluating' and the individual programs that are being 'evaluated'. There are many books, articles, online tools, courses and other resources that provide in-depth analyses of the subject. In fact, a recent Google search of 'Program Evaluation for Non-Profits' yielded 393,000,000 results. On www.canada.ca, there are evaluations for the programs/missions in every government department.

While Program Evaluation is certainly a broad and nuanced field, the following chart offers a quick visual reference:
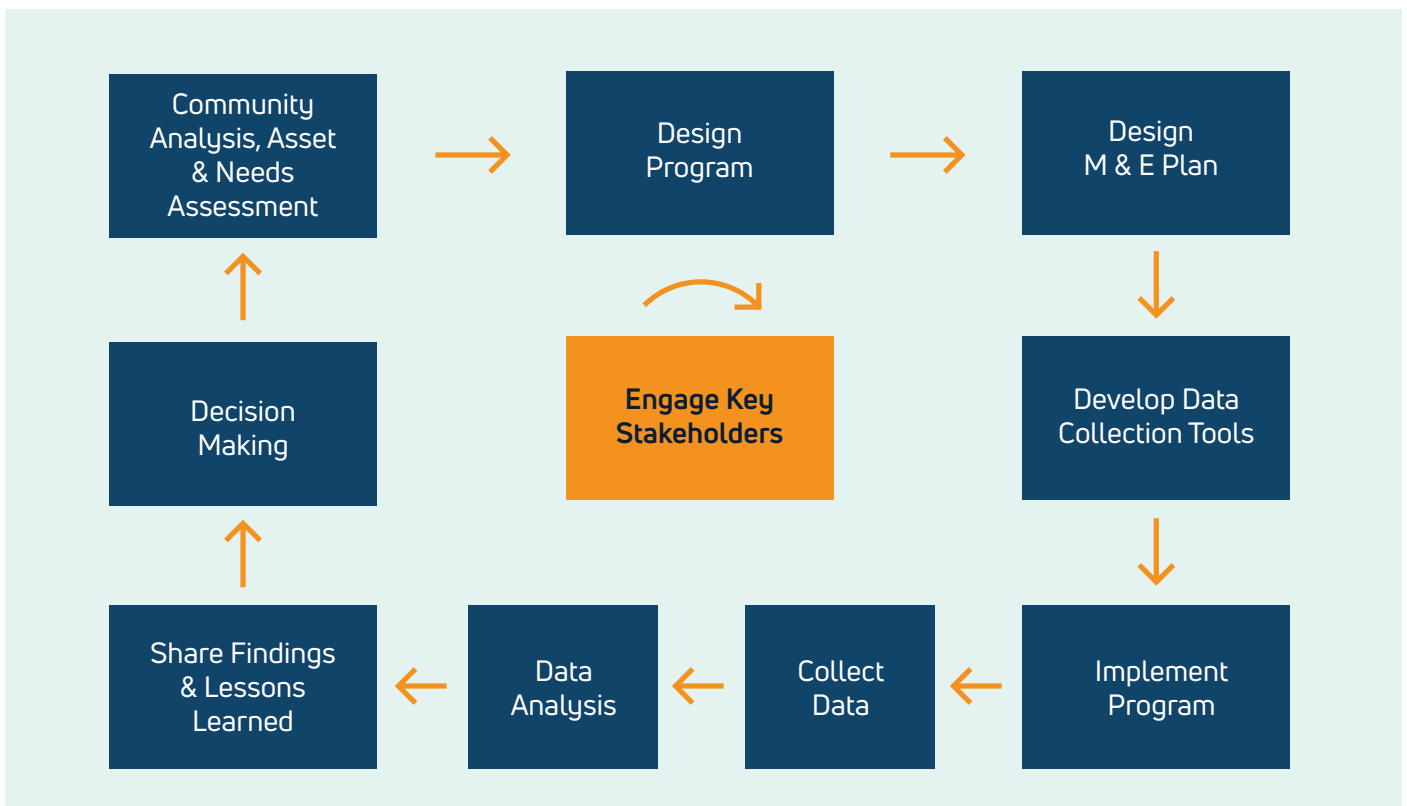
Appendices

Appendix A - Brief Glossary of Terms

Activities: The efforts undertaken to realize intended results.

Evaluation: Collection of information/data, formal and informal, to analyze and assess the activities and outcomes of a program.

Formative Evaluation: Ongoing or interim monitoring of program to determine what works, what doesn't and why.

Summative Evaluation: Conducted at the end of a program to determine if intended goals were met.

Impact: The long-term consequences of a program, or of a specific program component, that are the direct results of the outcomes—for example, better housing, improved earnings, better quality of life, etc. Impacts can refer to both the intended and unintended consequences of a program.

Indicators: These are specific, observable actions or conditions that demonstrate if the desired objective has been achieved and to what extent.

Inputs: The resources committed to the program—e.g. money, materials, equipment and supplies, activities, personnel.

Outcomes: These are the differences that a program makes in the lives of the people/communities the organization serves—e.g. specific changes in behaviour, living conditions, job opportunities, etc.

Outputs: The direct, measurable results of a program's activities—e.g. the number of people served, meals provided, training/courses offered, etc. Outputs reflect the volume of work but not the ultimate impact.

Quantitative Data: This is information based on raw numbers—information that can be counted and organized for analysis. These numbers can come from survey questionnaires, attendance at program sessions, etc.

Qualitative Data: Information gathered through observations, conversations, focus group discussions, etc. This is where participants describe how they feel about a program, their level of satisfaction, etc.

Appendix B - Indicators: A Case Study

Appendices B and C use the same case study example.

A non-profit organization developed an **Education and Employment Support Program** based on a needs assessment and literature review that addressed the challenges faced by youth aging out of care. Among other things, the data showed that youth aging out of care have low academic achievement and are often unemployed or underemployed. The Education and Employment Support Program was developed to improve their academic achievement, enrollment to post-secondary education, and access to good paying jobs. However, even if everything goes as planned, it will likely take at least 4-5 years for the non-profit organization to begin to assess the impact of this program. In other words, its impact will depend on the successful implementation of the program (e.g. youth are satisfied with their experience in the program) and the attainment of short-term outcomes (e.g. improved academic achievement, improved employability skills). To effectively measure the impact of this program, the non-profit organization must carefully select the indicators of program success.

The indicators

In the context of this Education and Employment Support Program, there are five program success indicators that need to be tracked. They are input, output, program quality, outcome, and impact indicators.

Appendix C - Measurement Examples

Appendices B and C use the same case study example.

Program	Education and Employment Support Program
Program target & Reach	To engage 50 youth aging out of care in education and employment supports
Indicator	# of youth engaged; # & type of education & employment supports provided
Data Collection Method	Attendance logs or program registration forms or brief survey
Measurement	How often do you attend the program? ☐ Every week ☐ Three times a month ☐ Twice a month ☐ Once a month ☐ From time to time Which of the following activities did you attend (check all that applies)? ☐ Math and Science support ☐ English Language support ☐ Education and Career coaching ☐ Developing Education and Career goals ☐ Other (please specify) _____

Program	Education and Employment Support Program
Program Quality	Youth aging out of care receive high quality education and employment support
Indicator	Rate of satisfaction; quality standard
Data Collection Method	Survey Questionnaire
Measurement	Please rate your experience in the program using a scale 1 to 5, where 1 is poor and 5 is excellent: **My interaction with staff and/or coaches was?** 1 2 3 4 5 **Staff's and/or coaches' understanding of my situation was?** 1 2 3 4 5 **Staff's and/or coaches' ability to listen to my concern/ideas was?** 1 2 3 4 5 **Education and/or employment supports were?** 1 2 3 4 5 **The opportunities given to apply what I learned in my life were?** 1 2 3 4 5

Program	Education and Employment Support Program
Program Quality	Youth aging out of care improve academic achievement, and employability skills
Indicator	Youth General Educational Development (GED) completion rate, level of employment readiness; employment skills in specific industry or field
Data Collection Method	Survey Questionnaire
Measurement	Please tell us the extent of your agreement with the following using a scale 1 to 5, where 1 is strongly disagree and 5 is strongly agree: **I have successfully completed my General Educational Development (GED)** 1 2 3 4 5 **My academics (in math or science or English language) have improved** 1 2 3 4 5 **My employment skills in the field of my choice has improved** 1 2 3 4 5 **I feel ready to apply for good paying jobs in the field of my choice** 1 2 3 4 5 **I have fulfilled the requirements to enroll in post-secondary education** 1 2 3 4 5

Program	Education and Employment Support Program
Program Quality	Youth aging out of care improve academic achievement, and access to good paying jobs
Indicator	Rate of enrollment to post-secondary education; access levels to good paying jobs in chosen industry or field; economic contribution (among youth aging out of care)
Data Collection Method	Survey Questionnaire
Measurement	Please tell us the extent of your agreement with the following using a scale 1 to 5, where 1 is strongly disagree and 5 is strongly agree:

I have enrolled in post-secondary education

     1   2   3   4   5

I feel confident to apply in good paying jobs in my chosen industry of field

     1   2   3   4   5

I was able to get a good paying job in in my chosen industry or field

     1   2   3   4   5

I have graduated or will be graduating from post-secondary education

     1   2   3   4   5

I am contributing to the economy as a citizen/tax payer

     1   2   3   4   5