Guiding Principles for Nonprofit Data & Learning Champions

How can we support our organization's efforts to use data to amplify impact?

What does it mean to be a data and learning champion within our organizations? As nonprofit professionals, we come to the table with different job titles and different responsibilities. What we have in common is a passion to make a bigger difference in the lives of our clients and the community. And a strong desire to support our nonprofits' ability to use data to amplify impact.

Below are seven principles which offer key recommendations and best practices to guide our work as data and learning champions.

The seven principles:

1. We advocate for prioritizing program level data that can be used to improve our work and strengthen our mission.
2. We are dedicated to having transparent conversations about the complexity and cost of achieving client outcomes and measuring impact.
3. We are committed to gaining participation and buy-in from staff and board in order to build a culture of learning.
4. We work to establish consistent systems and processes for evaluation.
5. We ask critical learning and evaluation questions.
6. We work to strengthen our own skills to more effectively serve as data and learning champions.
7. We can't do this work alone and seek out allies within our organizations and our nonprofit peers.

Guiding Principle #1: We advocate for prioritizing program level data that can be used to improve our work and strengthen our mission.

At its core, we believe evaluation is a learning process which should be used to help guide our programs and services. Because of this, we believe it is critical for our organizations to focus primarily on what data we need to develop and refine our program model, assess progress and guide ongoing programmatic improvements. Our first responsibility must be to our clients, as we seek to do better for those we serve.

In practice this may look like:

- Focus on data that can be used to guide program implementation and improvement. Gain clarity around why certain data is collected. Does the data help us to better understand what's working and what's not regarding our programs?
- Work to get data in the hands of front-line staff and managers sooner rather than later, to optimize on the ground, real-time learning.

- Consider ways to regularly collect data from clients; ensuring constituent voices are heard is critical to better understanding client outcomes and program benefits.
- Share the data back with our clients and constituents, letting them know how their feedback has helped to improve our work.

Guiding Principle #2. We are dedicated to having transparent conversations about the complexity and cost of achieving client outcomes and measuring impact.

We know that the work of creating change in our communities is challenging. We operate our programs in complex social environments and recognize that achieving outcomes for our clients is highly resource intensive and takes time and hard work. Therefore, we believe it is critical to have open and honest conversations within our organizations, as well as with our funders, about what it really takes to achieve results. We know these conversations can be difficult, and are hopeful that transparency will yield positive changes.

Likewise, we recognize that measuring the impact of our programs and services is also complex and messy. We may not have the resources to conduct the type of intensive, summative evaluation that would allow us to determine causation, i.e. did the program cause the change in participants' attitudes, behaviors, or conditions. We acknowledge these limitations and believe, in many cases, it is more useful for us to focus on "improvement" and progress toward results, and less on absolute "proof."

In practice this may look like:

- Don't be afraid to discuss openly the challenges of what it will take to truly create change for our clients and community. Dig into the research and industry best practices regarding program models and advocate for the resources needed.
- Clarify with organizational leadership what's possible (and what's not) when it comes to evaluation work. Discuss the differences between assessing causation versus contribution, assessing outcomes versus impact. When we do not have the ability or capacity to collect data on longer term outcomes, consider ways to build a case for how our programs contribute to the outcomes we are hoping to achieve by referring to research-based studies that can help establish this plausible link.
- Establish open communication with our funders and strive to have early and frequent conversations. Ask questions to clarify what types of data they are looking for. Will client testimonials or self-reports suffice, or are they looking for more in-depth evaluation (and if so, will they consider paying for this work)?

Guiding Principle #3: We are committed to gaining participation and buy-in from staff and board in order to build a culture of learning.

At times there has been a tendency among nonprofits to place sole responsibility for data collection and evaluation efforts in the hands of one department, or one individual. In these situations, evaluation can sometimes be viewed as something done "to us" rather than "with us." In addition, data and evaluation practices have sometimes been used to blame nonprofit staff, particularly when results aren't as anticipated.

However, we know that for our organizations to truly embrace a culture in which data is used for learning and improvement, we must work to ensure participation. This certainly includes evaluation "champions" at senior levels of the organization, but also front-line staff.

In practice this may look like:

- Plan regular opportunities to share data across the organization; consider integrating into existing meetings.
- Seek out feedback and ideas related to data efforts from program-level and front-line staff.
- Encourage staff to ask for questions and seek out help from organizational data and learning champions.
- Encourage organizational leadership to get involved and actively participate in this important work.
- Think creatively about ways to make data and evaluation accessible and engaging.
- Encourage "learning", "reflection" and "iteration" when collecting, analyzing and using data. This may be particularly important when results aren't as anticipated. Use these occasions to explore how programming can be improved, rather than assigning blame or focusing solely on accountability.

What is Evaluation?

The term "evaluation" often means different things to different people. We use the definition provided by FSG:

Evaluation is a systematic and intentional process of gathering and analyzing data to inform learning, decision-making and action.

(Gopal & Preskill, 2014, Retrieved from https://www.fsg.org/blog/what-evaluation-really)

Guiding Principle #4: We work to establish consistent processes and systems for evaluation.

As data and learning champions, we play an important role in working with others to put in place processes and systems related to data and evaluation. We know that developing these systems and making them a priority is critical to successful evaluation work. Building these processes take time, resources and courageous leaders at all levels of the organization and we are committed to doing our part.

In practice this may look like:

- Learn and then share best practices related to data and evaluation with other team members, managers, our ED/CEO, the board, etc.
- Find organizational allies who can also play a role in building these systems and advocating for change. Advocates at the leadership level are particularly important in order to encourage participation across the organization.
- Work to gain clarity regarding roles, responsibility and ownership of data and evaluation systems; everyone in the organization should be clear about the ways they can contribute.
- Encourage staff at all levels to develop competencies related to collecting, analyzing and utilizing data for learning and improvement. Also encourage staff to speak up when something isn't working and work together to find new solutions.

Guiding Principle #5: We ask critical learning and evaluation questions.

Data and learning champions don't need to be evaluation "experts". However, we do play an important role in asking critical questions that help our organizations reflect on programming, consider what's working and what's not and how to continually improve.

We also have a responsibility to help ensure we are collecting and using data in a responsible, ethical manner and that the voices and perspectives of stakeholders, most importantly our clients, are raised up.

In practice this may look like:

- Carve out regular opportunities (staff meetings, program planning sessions, etc.) to have conversations where critical evaluation questions can be discussed.
- Acknowledge that sometimes a data-related meeting will raise more questions than it answers…and that's ok!
- Asking critical questions about programming should start early in the process, not just after a program ends. For example:
    - Have we clearly defined our organization's target population?
    - What is our theory of change?
    - What does the research literature say about our program model?
    - Is the program being implemented as designed?
    - What should success look like for our clients?
- Ask questions related to data ethics, data sharing, and cultural competence. Examples include:
    - Have we put in place appropriate policies and procedures to guard client data and ensure compliance with state, federal and local policies?
    - Have all relevant staff been trained on these policies?
    - Do we have appropriate data sharing agreements in place with other nonprofit and/or public sector entities when needed?
    - Have we selected or created data collection tools that are culturally appropriate and vetted to reduce bias in language?
    - Do our clients understand their rights related to the collection and use of their data?
    - How do we ensure that our clients' voices and feedback are collected and regularly incorporated into our work?

Essential Practices for Cultural Competence in Evaluation

The American Evaluation Association's Statement on Cultural Competence in Evaluation offers a set of "essential practices" for developing and implementing a culturally competent evaluation:

1. Acknowledge the complexity of cultural identity.
2. Recognize the dynamics of power.
3. Recognize and eliminate bias in language.
4. Employ culturally appropriate methods.

For more information: *https://www.eval.org/ccstatement*

Guiding Principle #6: We work to strengthen our skills to more effectively serve as data and learning champions.

For data and learning champions to serve as effective leaders, we must continue to build our own skills and abilities and invest in ongoing learning opportunities. This includes efforts to build our technical and leadership skills, as well as strengthening our abilities to carry out evaluation efforts in ways that are culturally competent and promote social justice and equity.

In practice this may look like:

- Assess our strengths and weaknesses and leadership style, to better understand how we can most effectively support data and evaluation work and seek out relevant professional development opportunities.
- Reflect on the power and privilege we as individuals, and as representatives of our organizations, bring to this work. Look for opportunities to learn more about data and evaluation approaches (client feedback approaches, participatory evaluation, etc.) that seek to counter these power imbalances.
- Advocate for and support the funding needed to pursue professional development, both for ourselves and others on our team.
- Look for opportunities to take on additional responsibilities related to data and evaluation work to stretch and grow our skills.

Guiding Principle #7: We recognize we can't do this work alone and seek out allies within our organizations and peers in the nonprofit sector.

Helping to lead and support efforts related to developing and maintaining internal evaluation systems takes strong management, as well as creativity, technical expertise, communication, relationship building, etc. To do this work well, we must align our efforts with others in our organization and collaborate and learn from our nonprofit and public sector peers.

In practice this may look like:

- Seek out open-minded staff within our own organizations who also share a commitment to using evidence and data in order to develop and implement effective programming.
- Attend data and evaluation related networking events to build connections.
- Share our learning back with others on our teams and nonprofit peers.
- Encourage our peers and allies. We know that the work of creating change within our organizations can take years; it requires patience and an understanding that we are often "planting seeds" that take time to grow.