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## The Nonprofit Nerd (June 2017)

The Nonprofit Institute at Portland State University

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## Research you can use.

### What happens when a grant-maker and grant-writer learn evaluation together?

Jonathan Frochtzwaig and Deborah Vaughn were already acquainted when they came together last fall for our 2016 Professional Certificate in Nonprofit Program Evaluation. Young Audiences of Oregon and Southwest Washington was a past grant recipient from the Oregon Arts Commission. What did they learn from their experiences and from each other as they went through the training program together? Read on to find out!

*Let the resources and insights we share in The Nonprofit Nerd inspire you to get your nerd on and find innovative ways to make research and data work for you and your nonprofit!*

#### NERDS AT WORK

This month we're focusing on Learning Organizations and building a culture of continuous improvement! With their recent experience conducting evaluations for their organizations in our first PCNPE cohort, Jonathan Frochtzwaig, Grants Coordinator at [Young Audiences of Oregon and Southwest Washington](#) and Deborah Vaughn, Arts Education Coordinator for the [Oregon Arts Commission](#), reflect and share their takeaways.



Jonathan Frochtzwaig and Deborah Vaughn

### Congratulations on finishing your certifications in Nonprofit Program Evaluation this spring! Now that you've both been through NPI's training, what would you tell others who are thinking about doing an evaluation in their organizations? Is it worth the time? Why or why not?

**Deborah Vaughn:** I can't pretend that evaluation doesn't take a significant amount of time. But what I learned makes it worthwhile is to consider the full evaluation cycle. Taking the process from logic model to implementation to analysis and reporting provides valuable information that can then be used to adjust program delivery. What I'm learning isn't worth the time is the add-on measurement that doesn't align with the program and then doesn't get used to make any changes.

**Jonathan Frochtzwaig:** I agree: what's worth the time is what's going to get used, either by your development staff to communicate with funders, or your programs staff to adjust a program, or—and this is the dream—both. Evaluation is time-consuming, so you don't want to be doing it just as an exercise.

### You both dug into some really interesting evaluation questions for your own organizations this year. Did anything surprise you along the way? Any "aha!" moments?

**DV:** The biggest learning moment for me was when I looked at the outcomes for the program that I was evaluating and realized there was no way I was going to be able to actually measure those given the time frame I had. It forced me to go back to my logic model and work my way backwards to some short-term indicators that would show some progress towards those outcomes and would still be meaningful to my board. That exercise was tough, but also really valuable. And it allowed me to present some findings that are accurate and impactful, even though they were not specifically the stated outcomes of the program.

**JF:** Yeah, I don't know whether I can call it an "aha!" moment because it was gradual, but through the process I gained clarity on what aspects of our impact my organization could evaluate, and how. I think many arts organizations, especially, throw up their hands when it comes to evaluation because they usually can't measure the really big-picture effects of their work, but that doesn't mean they can't measure smaller-scale, yet still meaningful, outcomes. I learned that we shouldn't throw out the evaluation baby with the impossible-expectations bathwater.

### Deb, from a funder's perspective, what kind of evaluation efforts are you looking for from your grantees? What makes an organization's evaluation efforts stand out to you?

**DV:** My agency is primarily a grant-making one. We don't do a ton of direct programming. So that means we rely on organizations who receive our grant to help us achieve our mission. When I'm reviewing grants, I'm looking for proposals that are aligned with what I'm trying to accomplish. If the applicant can show me that their short term outcomes (the ones that would feasibly be achieved during the funding period) are indicators of progress towards my longer term outcomes, then I'm all in. In an ideal world, our two logic models would have similar language and would compliment each other. In the real world, one thing funders could work on is articulating their outcomes more clearly and revealing that logical process and where they see grant recipients filling a role. When we don't communicate clearly what we are trying to accomplish, evaluation on both sides (funder and recipient) gets less meaningful.

### And Jonathan, from your perspective, what are some of the unique challenges of evaluating arts programs? Do you have any advice for funders who want to encourage and support their grantees in doing effective evaluation?

**JF:** Probably the biggest challenge of evaluating arts programs is that some of the most important things we're trying to do—like inspiring creativity and fostering empathy—are hard to capture (though not always as hard as we think!). I think as a result, a lot of arts organizations are evaluation-averse. Funders of the arts who want to get meaningful evaluation information from their grantees should be willing and able to meet organizations where they are, and fund things like evaluation staff time, contract personnel, and materials. Just mandating evaluation might get you meaningful info—but it might just get you good hoop-jumping.

**DV:** When I read a report where I can see the hoop-jumping, I know it. It's a clue to me that there wasn't enough trust and communication between the funder and the grant recipient. It's an opportunity for me to loop back the next time and dive into those expectations and assumptions ahead of time. A few years ago, I added an "Evaluation" line item to our project budget form. I still get some applications with a zero dollar figure there, but gradually, applicants are starting to see that as a clue that we will absolutely fund evaluation costs. And when those costs are associated with a meaningful plan and staff or contractor expertise, then I start to get excited about what we might learn.

**JF:** Another challenge of arts evaluation is staying true to our outcomes. The culture and language of funders and evaluation often frames our work only in terms of its educational or career benefits—and the arts do provide those benefits. And the outcomes that are often left out—beauty and joy and meaning—are real and important, but our community needs them. The culture is not letting them be boxed out, or losing sight of them ourselves, in evaluating our programs.

**DV:** This is such an important reminder. It's easy to narrow our focus and get stuck in our left brains. One of the joys of evaluation for me is that I get to marry both sides of my brain: the left side works the logic model and sequential steps of the process while the right side keeps me grounded in why the arts are so important and gets to engage in some fancy data viz and presentation!

### What advice would you give to others who aren't sure where to start?

**JF:** Logic models have a stupid name and are a pain when they're imposed, but I think developing one on your own terms is actually a useful way to think through what a program is trying to do, and therefore how you can measure success. The Kellogg Foundation offers a [free Logic Model Development Guide](#), if you've not had the pleasure of logic-modeling before.

**DV:** Logic models can be beautiful and fun! [Healing With a Groove](#) uses theirs to communicate exactly who they are and why they do what they do. I use [this video from UT Austin's School of Public Affairs](#) as a good introduction to logic models.

*Know someone you'd like to see featured in the Nonprofit Nerd? Tell us who and why!*

#### RESEARCH SPOTLIGHT

In his widely-read [The Fifth Discipline](#), Peter Senge - a systems scientist at MIT's Sloan School of Management - outlined the five characteristics of the learning organization: personal mastery, mental models, shared vision, team learning, and systems thinking. But what does it mean to be a "learning nonprofit"? [SSIR defines it](#) simply as, "the intentional practice of collecting information, reflecting on it, and sharing the findings, to improve the performance of an organization." Writing for [SSIR](#), [Ruff and Olsen](#) argue that while selecting the right measurements matters, cultivating the ability to think like an analyst is the true "next frontier" in impact measurement.

If that sounds great, but you're wondering what it means in practice, we've compiled some tools to help you reflect on how your organization is learning from its work. Bridgespan Group suggests "beginning with the end in mind" and presents a useful framework for nonprofits interested in continuous improvement strategies in their [Measurement as Learning: What Nonprofit CEOs, Board Members and Philanthropists Need to Know to Keep Improving](#). The Urban Institute's guide, written for Head Start but applicable to many organizational settings, outlines the principles and practices necessary for [Moving Beyond a Culture of Compliance to a Culture of Continuous Improvement](#). Still not sure where to get started? Respected evaluator and organizational consultant Halle Preskill provides a [comprehensive toolkit](#) through FSG for understanding, assessing, and developing your organization's capacity for strategic learning through a system of evaluation.

The bottom line is this: no matter your organization's size, history or mission, taking time to reflect on how you learn from your efforts is a worthwhile step. Peter Senge's advice? "Start where you are with whoever is there."

#### INSTITUTE NEWS

**Applications are now open for two cohorts** of our 9-month [Professional Certificate in Nonprofit Program Evaluation](#)! Drop-in info sessions on June 13th (12-1:30pm) and August 8th (4:30-6pm) at the PSU Center Building, room 611. Which cohort is right for you?

- **Measuring Equity Learning Cohort:** made possible through support from Meyer Memorial Trust, NPI is hosting a special no-cost cohort specifically for organizations that seek to evaluate their equity plans and strategies.
- **Inclusive Learning Cohort:** open to a wide variety of organizations and evaluation questions, in this cohort you'll get hands-on support to complete your evaluation.
- Space in both cohorts is limited, so [apply soon!](#)

**We are also now accepting applications** for our 9-month [Professional Certificate in Nonprofit Fundraising](#), offered in partnership with Willamette Valley Development Officers and taught by experienced community fundraisers! [Info sessions on June 28th, July 12th and August 10th.](#)

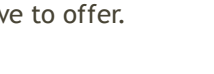
**Our friends at Oregon Program Evaluators Network** will host their [annual conference on October 4th](#), featuring respected evaluator and author Dr. Jean A. King. NPI will be there (along with some of our recent graduates!) for a facilitated conversation on building evaluation capacity. Don't miss it!

#### FELLOW NERDS

If you're interested in learning more about learning organizations, NPI recommends you get to know the great work of these fellow nerds!

- [FSG Strategic Learning and Evaluation Resources](#)
- [Infed.org \(YMCA George Williams College\): Learning in Organizations](#)
- [Carnegie Foundation: Carnegie Commons Blog](#)
- [Standord Social Innovation Review: Decision Making](#)
- [Standord Business Review: Decision Making](#)

If that's not nerdy enough for you, check out [our local and national friends](#) and the great research, data, and best practice resources they have to offer.



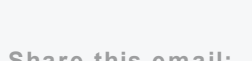
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