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 each 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.

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

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:

> ### The seven principles:
>
> 1. We advocate for prioritizing program level data that can be used to improve service delivery and strengthen our impact.
> 2. We acknowledge the challenges inherent in both achieving client outcomes and in measuring impact, and strive to have transparent conversations about the resources needed to do this work well.
> 3. We are committed to establishing a strong culture of learning and gaining buy-in from all staff.
> 4. We work to establish regularly systems and processes for evaluation.
> 5. As data and learning champions we don't have to have all the answers, but have an important responsibility to ask the right 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.

- 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 to 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.

Guiding Principle #2. We acknowledge the challenges inherent in both achieving client outcomes and in measuring impact, and strive to have transparent conversations about the resources needed to do this work well.

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.

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.
- When possible, work with organizational leadership to establish open communication with our funders and 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 establishing a strong culture of learning through data and gaining buy-in from staff and board.

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 buy-in from all staff. 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, as well as from our clients.
- Think creatively about ways to make data fun!
- 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 regular processes and systems for evaluation.

As data and learning champions, we play an important role in working with others to put in place regular 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.
- Advocate for gaining 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.

Guiding Principle #5: We recognize that as data and learning champions, we don't need to have all the answers, but we have an important responsibility to ask the right questions.

There is a lot to think about and do when it comes to developing and supporting internal evaluation systems and ensuring that data is regularly used for ongoing learning and improvement. While responsibility for this work should be spread across the organization, data and learning champions play an important role in asking the right type of questions to drive this work forward. We also play a critical role in teaching others in our organizations to learn how to ask critical questions as well.

In practice this may look like:

Asking critical questions related to issues such as:

- Program design, implementation and outcomes: Have we clearly defined our organization's target population? What does the research literature say about our program model? Is the program being implemented as designed? What does success look like for our clients?

- Data collection: Are we collecting data that we don't use? Are we clear about what data will be collected and when? When and how will data be shared? How confident are we in the accuracy of our data collected?

- Ethical and responsible use of data: 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?

- Cultural competence and social justice: 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? Is our organization committed to hiring diverse staff in all areas, including data and evaluation?

- Constituent voice: How do ensure that our clients' voices and feedback are collected and regularly incorporated into our work?

- Culture of learning: Is there staff buy-in at all levels of the organization? How can we build trust and reduce fear that staff might be experiencing related to data and evaluation 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 Principles #6: We work to strengthen our own 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.

In practice this may look like:

- Assess your strengths and weaknesses and leadership style, to better understand how you can most effectively support the data and evaluation work within our agencies.
- Seek out professional development opportunities, including conferences, trainings, webinars, and print resources.
- Ask for positive and constructive feedback from supervisors, mentors and peers.
- Look for opportunities to take on additional responsibilities related to data and evaluation to stretch and grow your 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 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, where possible, and collaborate and learn from our nonprofit and public sector peers.

In practice this may look like:

- Seek out like-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 trainings and networking events and connect with evaluators with diverse backgrounds and perspectives.
- Serve as model for our nonprofit partners and other community stakeholders.
- 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 will take time to grow.