Monitoring and Evaluation’s role in donor engagement, retention and reporting

Greg Simmons

Jo Garner
NFPs struggling to measure their impact

Charities need greater funding support to measure outcomes with many not for profits lacking the resources to do so effectively, new research has found.

“It also really pays for an organisation to develop their own outcomes measurement framework. It’s a big task but charities developing their own outcome tools and outcome measurement framework will be really setting the agenda.”

“Not only do organisations need to invest in developing internal capacity for measurement, funders need to come to the table and recognise the cost and effort associated with outcomes measurement and fund accordingly,” Zanella
Agenda

• Understanding the terminology
• Why monitor and evaluate?
• Getting ready for evaluation
• Identifying output and outcomes data
• What data to collect?
• Data collection methods
• How to use the data for donor engagement
**Monitoring and Evaluation**

**Monitoring** is the collection and analysis of information about a project or programme, undertaken while the project/programme is ongoing.

**Evaluation** is the systematic collection of information about a program in order to enable stakeholders to better understand the program, to improve program effectiveness, and/or to make decisions about future programming.
Why Monitor and Evaluate?

1. It can help make your work more effective. You are able to use limited resources most efficiently to have an impact.

2. The information you collect helps you report to your stakeholders, including financial supporters, and to attract further funding.

3. It also helps demonstrate that your organisation learns from its experience in order to develop and improve – an evolving organisation.
HUMAN SERVICES MATURITY MODEL

What Is Your Goal?

What Happened?

What results did we get?

How will we produce the results?

How can we produce better results?

Compare performance to sector benchmarks

Efficient and effective service delivery

Manage Outcomes

Improve the field through sector-wide collaboration

Retrospective view of effectiveness

Efficient compliance reporting

Count Outputs

Measure Outcomes

Service delivery managed to drive to individual client outcomes and improve program performance

Data driven decision making with insights from analytics; ability to compare performance to others in sector

Compliance driven reporting

Outcomes measured with real-time reporting

Good Intentions

Efficient data entry

Pen & paper

Electronics data entry

Data used in everyday mgmt

Tech shared & data used across orgs
A successful evaluation is one that answers your questions about the outcomes of a project using robust data. Evaluation—what is it and why do I need it?
The questions we need to be able to answer...

- What's the track record of your organisation?
- How do you know there is a need for your work?
- How will you know your suggested approach will work?
- What difference will your project make?
- Did we do what we said we’d do?
- To what extent did it make a difference?
- How do we know?
Getting ready – we need to understand...

What will happen?

What does a good evaluation plan look like?

Who can do it?

Where does it go in a proposal?

How much does it cost?

What are you supposed to do with the results?
More Definitions and getting ready…
W.K. Kellogg Foundation Logic Model Guide

**Resources / Inputs**
- Certain resources are needed to operate your program

**Activities**
- If you have access to them, then you can use them to accomplish your planned activities

**Outputs**
- If you accomplish your planned activities, then you will hopefully deliver the amount of product and/or service that you intended

**Outcomes**
- If you accomplish your planned activities to the extent you intended, then your participants will benefit in certain ways

**Impact**
- If these benefits to participants are achieved, then certain changes in organizations, communities or systems might be expected to occur

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**Your Planned Work**

**Your Intended Results**
Example: Harm Reduction Model

The Project:
St Joseph’s partner with ABC Health Services to establish a harm-reduction model to help **homeless addicts** by treating the critical needs of the individual. They will do this by providing **short-term supported accommodation and rehabilitation treatment**. Counselling staff will also work together with residents to assist with **accommodation options**.

**Assumptions:** A harm-reduction focus on addiction treatment paired with supported accommodation will lead to a reduction in homelessness.
Foundations of an evaluation plan

1. Program logic/theory of change
2. Evaluation questions
3. Indicators and definitions of program success
4. Data collection
What is a good key evaluation question?
Evaluation Questions

- Emerge from your program logic
- Ask about the program’s implementation (process)/effectiveness/efficiency/outcomes/impact
- Are sufficiently specific to the scope of the project
- Are often phrased to investigate ‘to what extent’

EXAMPLE KEQ’S
- To what extent does having their health and accommodation needs met help clients sustain long-term housing?

Sub Questions e.g.
- To what extent does the live-in program model create better outcomes in addiction recovery to St Joseph’s previous drop-in centre model?
- To what extent does the program increase clients’ confidence and ability to seek and retain housing?
Things to think about to gather the evidence

**Indicators**

- Identify indicators for activities and outcomes

**Sources of evidence/methods of data collection**

- Consider the range of data sources available to you and choose the most appropriate one.
- Consider the range of data collection methods and choose those best suited to your context and content.

**Quality & Quantity**

- Where possible test new data capture methods (i.e., surveys/interview questions) and then refine
- Consider whether you’ll need both qualitative and quantitative data.
- Consider quality and quantity issues in data collection.
**KEQ 1:** To what extent does having their health and accommodation needs met help clients sustain long-term housing?

**Indicators**
- Clinical assessment of substance use minimisation at 1 month after entry into the program
- % difference in self-reported reduction in substance use in first month
- Competence and improvement in living skills (pre and post entry)
- Improvements in levels of knowledge and confidence in managing health needs
- Three timepoint measures on quality of life and wellbeing survey tool
- 5-week post-exit follow up on housing status

**Sources of evidence/methods of data collection**
- Clinical nurse and social worker case reports
- Client weekly self-reporting
- Client pre and post surveys
When considering your evaluation tools, keep in mind the following:

• What is being measured?

• What audience was the tool created for and tested with?

• What context or setting is the tool meant for?

• Do I have the expertise to be able to judge the appropriateness and quality of the tool?

**Evaluation – toolbox**

**Quantitative tools- counting measures**
How many, how much or how often something has occurred. Often expressed as percentages, ratios or rates. Eg.

• Head count:
• Testing & Pre and post tests
• Rating Scales
• Comparison and Controls

**Qualitative tools – measures of human experience**
Why or how something happened useful for understanding attitudes, beliefs and behaviours.

• Observation
• Surveys
• Journals
• Case Studies
• Focus Groups
• Interviews
Engaging your donors – Tell the story

**Activities**
- Confirm lease agreement
- MOUs with referral partners
- Purchase furniture
- Install fittings
- Employ onsite social worker and clinical nurse

**Outputs**
- 8 x furnished accommodation units and communal areas
- 2 x treatment rooms
- 32 clients treated and housed per year

**Outcomes**
- Reduced periods of homelessness and housing insecurity for those facing addiction recovery.
- Decreased relapse into substance abuse due to decreased stressors
- Increased length of accommodation
- Better health & wellbeing outcomes for residents

**Impact**
- Decreased number of presentations to emergency departments
- Decreased homelessness
- Increased quality of life for clients and their families

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Case studies + outcomes graphs mapped over time
Analysis – Some Tips

Have your set of projected outcomes from the project planning stage with you as you are looking through your data sets – **they’ll tell you the questions you want to answer with your data.**

Don’t ignore everything that doesn’t fit your hypothesis – it may be trying to tell you something!

**Be careful with data that may be influenced by other variables** – you can still use it, it can even be highly informative, just be clear about its possible biases. Ie. If a child in your camp for anxious children program is also taking part in weekly breathing and meditation practice. It might be important to note that impacts of your camp are even more beneficial when paired with this other program.

**You can’t be sure but you can be objective!**
Using the results in donor engagement

- What recommendations do we want to make?
- What actions should be taken based on what we learned?
- With whom should we share our evaluation findings?
- What findings will interest different stakeholder groups? How will we reach them?
- When and how should we share recommendations so they are timely and have maximum effect?
Writing an evaluation plan at the program planning stage helps you to map out

• the questions you need to ask
• the information you need to collect
• from whom and how you will collect information
• potential issues and risks
• a timeline
• the resources you need, and
• what you will do with the information
The Challenge

In 2016 they realised that things ‘just weren’t working’ and bravely set about revolutionising their approach to funding. CWFA faced several internal and external influences, which drove their decision-making.

External challenges
• The state government’s decision to move from an output-based to an outcomes-based funding model
• Growing uncertainty about the impact of the NDIS
• The impacts of a boom bust economy on the sector overall

Internal challenges
• Administration had become unsustainable
• Structure and strategy had become misaligned

“We needed a software solution that provided real-time reporting, accountability, transparency, an audit trail...& something that could reduce the administration load”

Because of the low entry cost (and associated risk) CFWA were able to trial Apricot as a replacement for their existing manual processes.

Homecare workers were supplied with tablets which meant they could enter timesheets directly into Apricot in the field, in real time and get immediate client authorisation, providing an audit trail and great transparency.
Client and Resource Folders
Evidence Based Validated Tools
## Stages of Change/Auditability

### Children's Education

6. Children's Education

- One or more school-aged children not enrolled in school
- One or more school-aged children enrolled in school but not attending classes
- Enrolled in school, but one or more children only occasionally attending classes
- Enrolled in school and attending classes most of the time
- All school-aged children enrolled and attending on a regular basis

### New Section

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Aggregated Reporting

Enrollment by Program:
- Program A: 59
- Program B: 58
- Program C: 29
- Youth Development: 21
- Adult Case Management: 48
- Mentoring: 3

Avg Self Sufficiency Score Improvement:
- Baseline: 23.64
- Follow Up - 3 months: 45.2
- Follow Up - 6 months: 55
- Follow Up - 9 months: 59
- Program Exit: 51.92

Target Score: 80
The Results

Despite requiring a huge paradigm shift, the move to Outcomes-Based funding has proved to be an incredibly successful and flexible way for CWFA to access funding.

With instant insight into program Outcomes, they now have the freedom to modify activities if they aren’t having the desired impact, and do more of the things that work well.

Just 6 months after implementing Apricot, CFWA received a phone call saying that through the reports they’d provided, the Health Department had identified that they were over servicing one client group and needed to negotiate a variation to contract to provide additional funds.

• Helped secure $4m Outcomes-based funding contract indexed over 5 years
• Reduced admin time by at least 25%
• Eliminated all double (and in some cases triple) handling of paper records
• Reduced travel expenses (through Google map integration)
• Reduced costs in terms of postage, stationery and error correction
• Ability to produce detailed statistical reports in seconds
• Improved stakeholder engagement
• Ability to provide the crucial qualitative data to funders (through online surveys & feedback forms)
• Winner of the 2016 Telstra Business Awards WA
How to Tell Powerful Impact Stories with Data

Video Nonprofit Story

Social Media Nonprofit Story

Annual Report Nonprofit Story
Questions and discussion

THANK YOU

• greg.simmons@blackbaud.com.au
• jo@strategicgrants.com.au