A Community-based Assessment of Measuring What Matters

Opportunities for Growth & Impact

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Executive Summary

In spring 2021, Mission Capital commissioned Knology to manage a community-based participatory action assessment of the Measuring What Matters program (MWM), a capacity building offering launched by Good Measure to support non-profits in Central Texas. The MWM program aims to increase non-profit program efficacy in the area through skills training with user-centered evaluation practices. From 2017-2019, the program was offered annually at no cost to non-profit organizations receiving funding from the foundations that are part of and support Good Measure. In 2020, Good Measure revamped the recruitment strategy of MWM to include non-profit organizations outside of the traditionally funded network. After four years of program implementation, Good Measure sought to understand the impacts and opportunities for MWM for a next generation.

Knology facilitated a community-based evaluation approach to assess MWM's impact. Community-based evaluation is part of a suite of participatory approaches. What sets this kind of evaluation apart is its distinct focus on a specific defined community – in this case, non-profits in Central Texas. It uses both quantitative and qualitative methodologies to capture the variation in the actions and participation of the communities involved as well as their lived experiences.

Community-based evaluation process proved challenging due to a range of demands on participants' time. Many program alumni declined to participate in the work, and those who did were challenged to describe how MWM had helped them build community. Despite those limitations, participants who engaged in the process uniformly reported substantial growth in their individual skills, value to their organization, and increased attention to user voice as central to their evaluation strategies. Most participants appreciated the MWM experience for providing concentrated time and guidance to aid in their program improvement assessments. They also appreciated guidance from MWM on how they might advocate for user-centered evaluation strategies.

We learned that MWM training was perceived as increasing organizational capacity for evaluation. Organizations with dedicated evaluation teams claimed that they were able to refine their work products and better center the needs of their service community in their approaches. For organizations with emerging evaluation programs, receiving mentoring and guidance from MWM helped build skills to redress important deficits.

Funder priorities reduced the degree to which MWM skills and approaches could be used in practice. Participants shared common concerns that most funders continue to require monitoring reports that offer little value to program improvement and tend toward quantitative observation as a paradigm such as students' test scores or grades rather than individual gains. This belief persists despite evidence that these comparative measures do not value lived experience and often conceal valued impacts from a user's perspective.

The evaluation could not determine the degree to which MWM increased engagement with Mission Capital after the participants completed the program due to challenges with

response rates during the pandemic. Yet, we heard from those who did choose to engage with the evaluation process that they were uniformly supportive of the work of Mission Capital and valued the support they received through MWM. While participants' responses indicated that MWM's work had not led to a "community" of evaluators, many valued the connections they made through the program, and reported staying in touch with others in their cohort. Others mentioned being part of self-formed evaluator communities with other MWM alumni.

Many of the participants who shaped this assessment expressed concerns about the struggle to raise awareness of the needs of their population in the political culture of the region. For those evaluators whose past experience is consistent with the needs of their current service population, there was a clear sense that they continue to struggle with prejudice and exclusion. These issues raise a valuable point for how Mission Capital, through Good Measure, can support the MWM program and trainees. A critical area for future growth will be identifying ways to aid evaluators who also represent service population groups, to support their expertise as advocates for centering service populations in evaluation. It will also be important for Good Measure to provide scaffolds to help these individuals build skills and experience connecting with funders.

Based on the community feedback, we observed several opportunities to make changes to the MWM program that help accomplish Mission Capital and Good Measure's vision.

Enhance the current MWM structure through:

- Building learning cohorts based on similarity in the sizes of the organizations, experience with evaluation, and general service types. This approach may increase the degree to which collaborations within the training program are perceived to be reciprocal;
- Clarifying the needs of trainees to ensure a fit between the mentoring offered and the organizational capacities of the trainees;
- Requiring participation by trainees' organizational leadership and/or senior board members to support post-program shared language about evaluation principles and discussions on how MWM learning can be integrated into workplans and outputs that serve their missions;
- Expanding the focus on creative ways to engage with service populations where extreme need makes participation in evaluation difficult or who have reasons to be reticent about participating in traditional evaluation programs (i.e.: formerly incarcerated individuals, those who struggle with addiction, victims of violence, or children living with food insecurities); and
- Using more inclusive language in the MWM application to indicate clearly that people in multiple roles within non-profits can participate in and benefit from the programming.

Organizational support for MWM alumni could be enhanced by:

- Creating communications tools that publicize evaluation successes and strategies from former participants, that are targeted towards the alumni's leadership and boards; and

- Direct advocacy by the Mission Capital team to funders to explain the value of user-centered evaluation for program improvement.

Engagement with Mission Capital could be enhanced by:

- Offering infrastructural scaffolding, and publicizing the efforts of the existing informal evaluator groups;
- Supporting an annual convening for alumni to share their work, methods, and findings, that includes unstructured time to build stronger relationships; and
- Creating an ongoing mentorship check-in for smaller and under-resourced non-profits where an evaluator may not have in-house colleagues or may have many other duties.

Equity and Inclusion could be enhanced by:

- Reshaping recruitment to specifically invite groups that serve traditionally under-represented communities who seldom benefit from the funders of MWM;
- Hosting events for Central Texas evaluators that are headlined by national voices for evaluation methods who have overcome exclusion, bias, disclusion, or marginalization in their communities; and
- Acknowledging past practices, lived histories, and indigenous knowledge as important vocabularies for evaluation in Central Texas, and using those lenses to establish new norms and ways of convening.

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Introduction

Mission Capital works to support the Central Texas Nonprofit community by equipping and connecting mission-driven leaders, organizations, and networks advancing equity and opportunity through their work.

Good Measure is a group of philanthropic organizations from Mission Capital who work together with their grantees and other non-profit organizations to creatively and strategically use data to make a bigger difference in the lives of more people. The collaborative was founded to pool resources and staff time to offer a unified voice on the importance of using evaluation for learning and continuous improvement. As part of that work, Good Measure developed a set of guiding principles for funders and nonprofit data champions. Mission Capital has served as the collaborative's "backbone" since its inception and manages the Measuring What Matters program and other programs.

Measuring What Matters (MWM) is a six-month training program designed to help organizational teams make progress on specific data or evaluation-related goals. More than 160 individuals participated in MWM between 2017 – 2020 and accessed other support from Mission Capital.

Mission Capital and Good Measure paused the program during the global pandemic in 2021 to assess the impacts and opportunities for improvement. The collaborative commissioned Knology to facilitate a community-based participatory action assessment, a process that uses the same pedagogical approach as the training, to learn from participants how they might increase impact and meet their strategic goals.

Project Background

Going into the project, Knology had an evaluation plan that closely aligned with the proposal that we submitted to Mission Capital. Over the course of the evaluation, that plan evolved to accommodate new realities that we could not have foreseen at the start of the project. The changing nature of the evaluation helped to highlight some important points about community-based evaluation. The underlying story of this project is a valuable case study in how community-based evaluation occurs in real-world contexts.

As the name implies, this kind of evaluation involves gathering feedback from multiple stakeholders and refining activities over time as new insights come in. Fundamentally, it assumes the existence of a community of persons with shared goals or values. One of the early findings from this process was that evaluators in Central Texas non-profits do not yet feel that they are part of a community. As such, they did not have shared language and definitions in place for talking about evaluation practices.

Community-based evaluation also requires the full participation and engagement of the target audience. In this instance, the ongoing COVID-19 pandemic made that level of participation challenging for most MWM alumni, who diverted most of their energies to finding ways to keep providing services to their communities. This meant that evaluators had to revise some of the proposed strategies for gathering the information for the assessment and incorporate new ones. Limited participation highlighted a second issue. A successful community-based evaluation depends on the participation of diverse members of the community in question to truly capture a full range of perspectives. As co-creators of the evaluation process, Knology, the Good Measure staff and steering committee, and non-profit leaders recognized the need to hear from the voices missing in the room. This was an important consideration both for the evaluation described in this report and for rethinking Good Measure's approach to recruiting participants in MWM more broadly.

Project History & Methods

Our first step brought together a Community Co-design session, intended to lay the groundwork for the evaluation and to think about possible impacts and outcomes that flowed from their experience with MWM. The co-design session with non-profit evaluators who had participated in the training was to surface meta-cognitive thinking about their lived experience, and to assess what evidence of impact they witnessed, including evidence that supports the core questions of the funding entities. The session was also intended to acknowledge and celebrate any unanticipated outcomes.

The session included six alumni, two coaches/former Mission Capital staff, two program staff, members of the Good Measure steering committee, and four Knology staff. Knology and Mission Capital staff facilitated breakout rooms to allow participants time and opportunity to answer some key questions. All participants were considered part of the co-design community, which sought to create a safe open dialogue between funders, funding recipients, trainees, and coaches.

The meeting surfaced some important themes – including critical questions about the people and organizations that were missing in the room, and voices and perspectives that were not heard.

Based on the priorities that emerged during the session, Knology synthesized the feedback into a set of draft evaluation instruments - survey and focus groups protocols that drew directly from the co-design language and concepts. We revised these instruments in a workshop with the Good Measure steering committee and staff. As a result of conversations during that workshop, the team recognized that a revised evaluation plan and scope of work would be more likely to surface impacts of the MWM program. That revised evaluation plan included a second co-design workshop that would offer an opportunity for more voices from the MWM community to be heard. Knology and the steering committee also agreed to solicit feedback from MWM alumni at various points throughout the evaluation including asking them to review the instruments and results. To achieve this goal, we set out to create a Community Advisory Group that MWM alumni could opt into.

Several workshop participants from the first co-design session provide feedback on the first draft of the evaluation instruments. We presented the revised instruments to participants in the second co-design session. The second co-design was structured a bit differently from the first session. Instead of a single group session, evaluators held individual discussions with three alumni.

Knology refined the instruments once more and then sent the second draft to Good Measure staff, steering committee members, and the three participants from the second co-design for final feedback. The final instrument included some additional questions related to evaluation experiences during COVID.

As indicated above, alumni response rates to the instruments were a concern especially given the limited participation in the co-design sessions. These concerns led Knology and Good Measure to expand the survey distribution to four potential stakeholders: MWM alumni, their organization's executives, funders in the region, and steering committee, coaches, and advisors working with Good Measure. Additionally, the evaluators considered different audiences for focus groups. The idea was to use the focus groups to bring survey non-respondents into the mix, and "critical friends" of Mission Capital, observers familiar with the program who could offer feedback on MWM as it exists and offer suggestions for growth and improvement.

Instruments were finalized in November 2021, approved by the IRB for review, and released following the holiday season in early 2022. Out of a possible 160 program alumni, Good Measure identified 126 possible participants in the survey. Of these 126 alumni, we received 36 responses, a 29% response rate. We also asked survey respondents to forward the survey to their board members, CEOs, and staff at organizations where MWM alumni work. We received three additional responses from this effort for a total *N* = 39. We offered a $15 incentive to all survey respondents.

Separately, we sent a shorter survey with similar questions to members of the MWM steering committee, the Good Measure advisory committee, and Good Measure coaches and former staff. We received 11 responses from that group (six steering, four coaches, one advisory member), for about a 50% response rate.

Following our analysis of the survey responses, we recruited three focus groups of community representatives to offer their thoughts about the results, with a particular focus on questions that elicited wide-ranges or bi-polar responses. We wanted to discuss those questions in depth to gain a better understanding of the variety in the responses we received. These groups included people who had responded to the survey and who had participated in the co-design groups. We also reached out to alumni who had not responded to the survey and offered them an opportunity to participate in the focus groups, however, none were inclined to do so. We offered a $35 incentive to participants from non-profit organizations.

As a final strategy for fully capturing information about MWM, the Knology team conducted two discussions of the results of the study with people nominated by Mission Capital staff as critical advisors who might be willing to share "unvarnished critiques" of the program. These conversations took place in April 2022.

This report draws on the data collected from the co-design sessions, survey, and focus groups to offer insights into MWM program impacts. All results are reported anonymously. In the chapters that follow, we explore the current impact of the MWM program on individuals and organizations as well as opportunities for Good Measure to reach new non-profits with its programming.

Impact on Individual Evaluation Practice

We received 39 survey responses from staff at 28 different organizations. Most respondents were MWM alumni. When we asked alumni to describe how their work had changed due to their participation in the program, it was clear from their responses that MWM had changed how they think about evaluation. We saw evidence that alumni were thinking critically about the timing of evaluation and the value that the collected data brings to their programs:

> *"I think about evaluation up front rather than at the end of a program and include many members from my organization in conversations about evaluation."*
>
> *"MWM helped me become more comfortable with evaluation. It helped me see how collecting data is not the enemy but if done correctly it is a great tool to make sure you are providing the best programming possible."*
>
> *"[My work has become] more client-centered and focused on ensuring programs are evidence based/evidence informed."*

Many respondents described their work as more "*focused*" or "*intentional*" about data. While funders require data-based evaluation reports as part of grant compliance, prior to participation in MWM, most non-profit staff were not necessarily thinking about data as a way to elevate their service community's voices and guide program improvement. Through MWM, they gained an understanding of which data would be relevant to collect for these purposes.

An alumnus that we spoke to in a focus group provided a specific example. Their non-profit offers tutoring and mentoring to students in Central Texas. They explained that while they could assess the efficacy of their tutoring programs by looking at academic measures, success for a mentorship program was less clearly defined. Their participation in MWM has helped to change that. They said, "*The program [MWM] was really helpful and inspired us. And we came up with some really good schemes*" to evaluate mentorship services.

While most alumni that we heard from said MWM increased their personal capacity for evaluation, there were some for whom the program was less transformative. These individuals came to the program with a higher level of knowledge around evaluation and pre-existing practices for gathering community input on programming.

For example, one focus group attendee who had completed a PhD already had extensive experience with data from their doctoral studies. "*I've always felt like evaluation was a strong background that I had. And I've always enjoyed the data [...] so I've always tried to make data-driven decisions*," they said. However, they described the program as valuable for helping their coworkers and funders to be invested in evaluation for program improvement. It was also helpful for them personally in providing an outside perspective, and a reminder of best practices. *"There's always room for improvement...Just thinking about it more...you know, stepping back, and taking a look at it all is always good, because you do get set in your own ways."*

Focus group participants from another non-profit, who also entered the program with a high capacity for conducting evaluation, said the program was valuable because of the opportunity to form connections and exchange ideas with people from other organizations.

In the survey, we asked alumni to tell us about what they do differently after participating in MWM. Figure 1 below shows a stacked bar chart of items that we included in the survey question and the responses from participants. For each item in the question, we received 39 responses. For most of the items in the question, alumni said they performed the activity either ***more often*** or ***much more often*** than they did prior to participating in MWM. Two exceptions were ***bring community into eval design process*** and ***involve community in interpreting eval data***. For these two activities, respondents mostly reported no change. These findings and the feedback during our discussions and co-design session may indicate two separate unrelated causes, the first being the service community may be resistant or unable to meaningfully engage in those tasks, or that administrative barriers prevent that engagement.

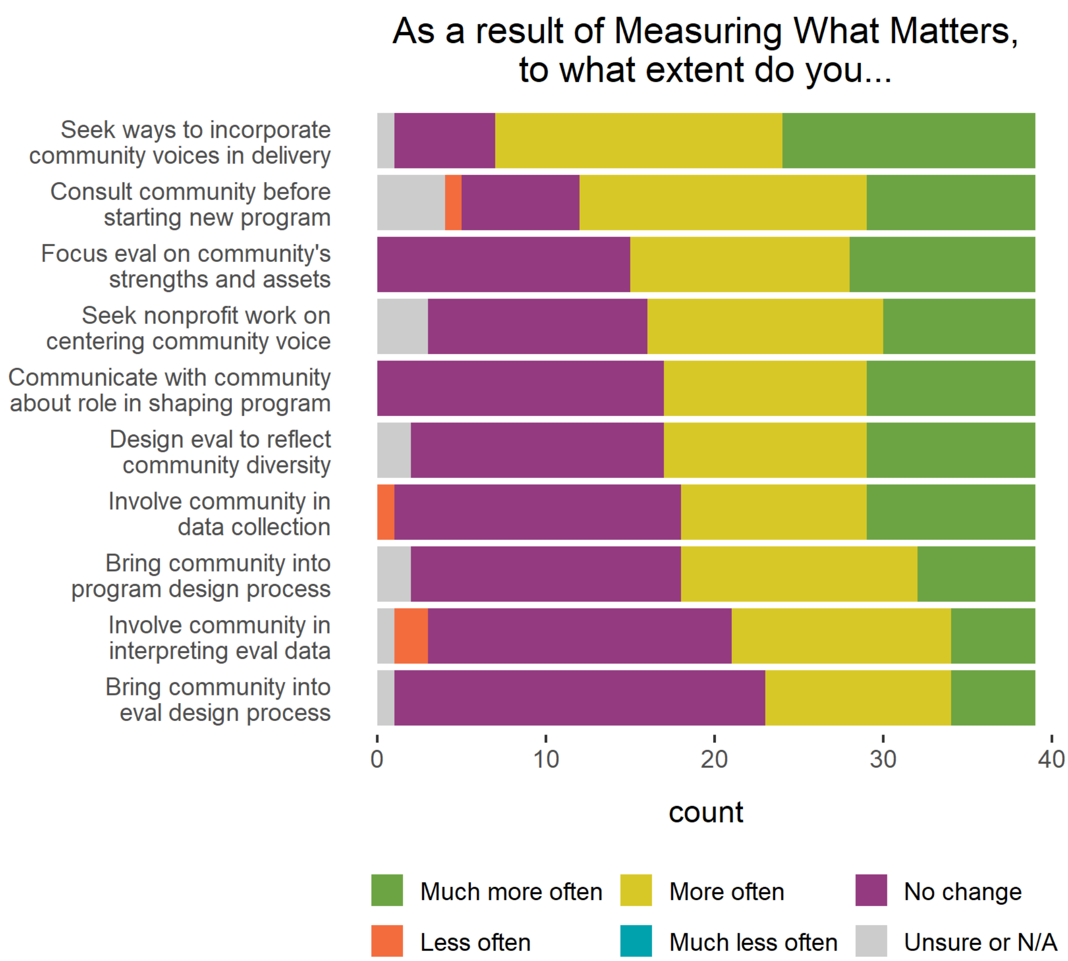

Figure 1. Changes in how alumni approached their organizations' service communities as a result of their participation in Measuring What Matters

Impact on Organizational Capacity for Evaluation

Alumni's feedback on MWM was generally positive and often described as a transformational experience for individual participants. But this did not uniformly translate into change at the organizational level. In a focus group, one participant explained,

> *"Data and research were very close to me, but in the rest of the organization, there wasn't a huge culture of evaluation. So, what [colleagues] and I were able to bring back was more a starting point than any solutions."*

In the survey, we asked MWM alumni to tell us about changes in how they use evaluation. Figure 2 shows a stacked bar chart of items asked in the survey question. For each item, we received 39 responses. For most of the items in the question, alumni said their organization performed the activity either ***more often*** or ***much more often*** than they did prior to participating, except for ***use eval primarily for grant compliance.*** This is a positive outcome demonstrating that evaluation focus shifted from some away from strictly grant compliance.

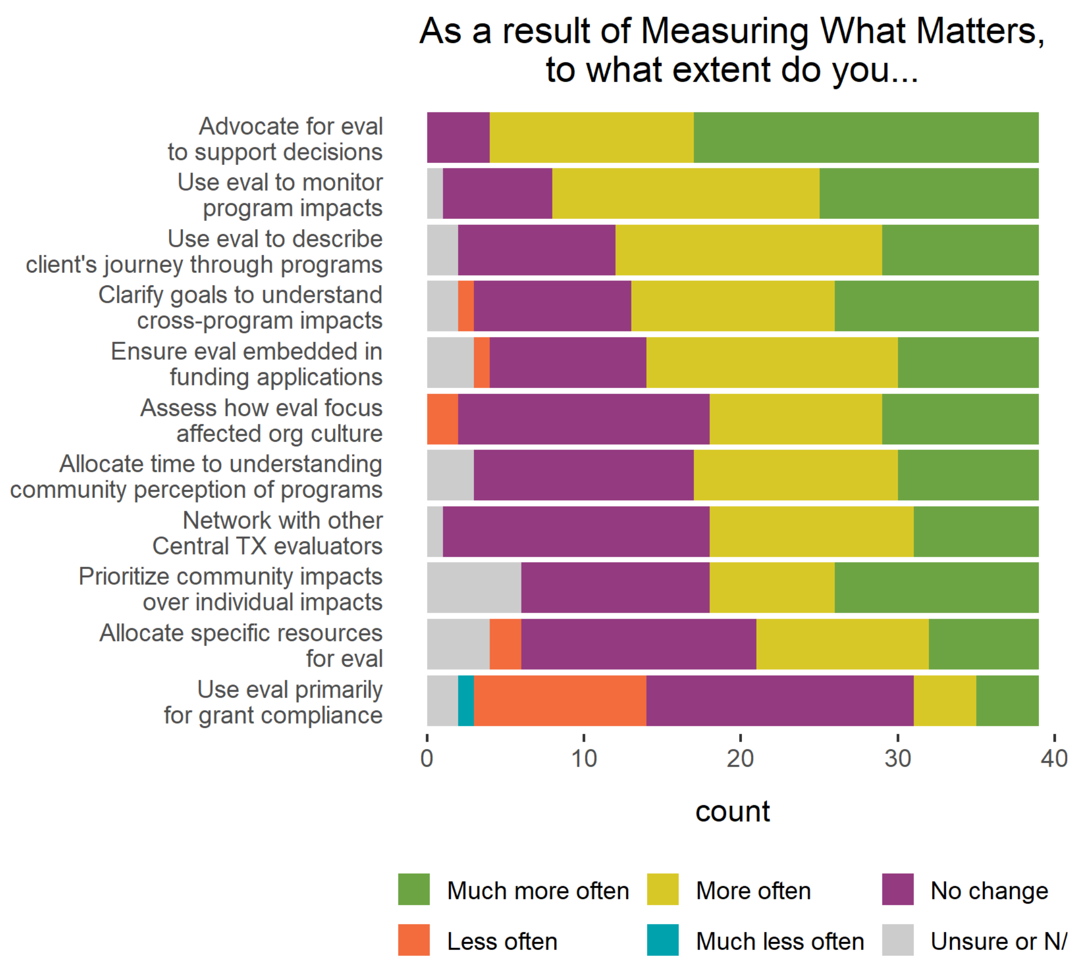

Figure 2. Changes in how alumni use evaluation in their work as a result of participation in Measuring What Matters

Our data represented a wide range of responses, a condition that we explored more in the follow-up focus groups. These discussions suggested that the scale of a non-profit and the professionalism of the staff prior to engagement with MWM impacted the degree and type of change reported. We detected distinct positive impacts related to more client centering of evaluation and the reduction in evaluation for grant compliance.

During focus groups, participants noted that most non-profits sent teams to MWM training that did not tend to include executive-level staff with the power to set budgets and priorities. As one participant noted, "*You really do have to have buy-in from the leadership of your organization if you're going to make any substantive change.*" In surveys and focus groups, we saw a clear link between non-profits where senior leadership participated in MWM learning and the likelihood that evaluation became embedded in practice.

Many non-profits rely on grants to fund their work and that can impose some limits on the kinds of activities that staff can engage in. Respondents to our surveys and focus groups said that many of their grants have reporting requirements that do not match the principles learned in the MWM program. They also said that many grants have restrictions on how the money can be used that prevent them from implementing some of the approaches developed through MWM.

Evaluators also mentioned during the discussions that some of their funders require collection of metrics that they do not see as relevant, either to monitoring status, impact, or individual growth. They described measuring contact hours as an example of general benchmarking rather than transformations that could be achieved through programming. Participants said that many of these requirements increased their workload without adding meaningful value to their clients or contributing to long term program improvement.

Focus group participants also noted that some funders seek to support specific interventions or new programs that align with their areas of interest. They are less interested in funding efforts to refine existing, successful programs or pilot test ideas not developed by the funder. As one respondent explained,

> *"Sometimes the funders have great intentions, but they don't have enough understanding of the data to put an idea together that makes it effective. So, then we're writing grants to [their] idea. And it's kind of like mission creep, because we somewhat believe in the idea, but we somewhat just need the funding. And so, we're gonna do [what the funder asks] to get this funding."*

When we designed our survey, we included several items that could be characterized as a negative view on the state of non-profits in Central Texas. For instance, the statement "*Funders in Central Texas want evaluation results that make them look good*" was an example of negative motivations for evaluation, as opposed to "*Funders in Central Texas want non-profits to use evaluation to help with program improvement.*" The responses from those items are presented in Figure 3 below. A summary of the patterns in the responses revealed that all four of the items, negatively worded and positively worded, that mentioned funding or funders were positively correlated. The summary confirmed that evaluation is inextricably tied to funding compliance and funder reporting.

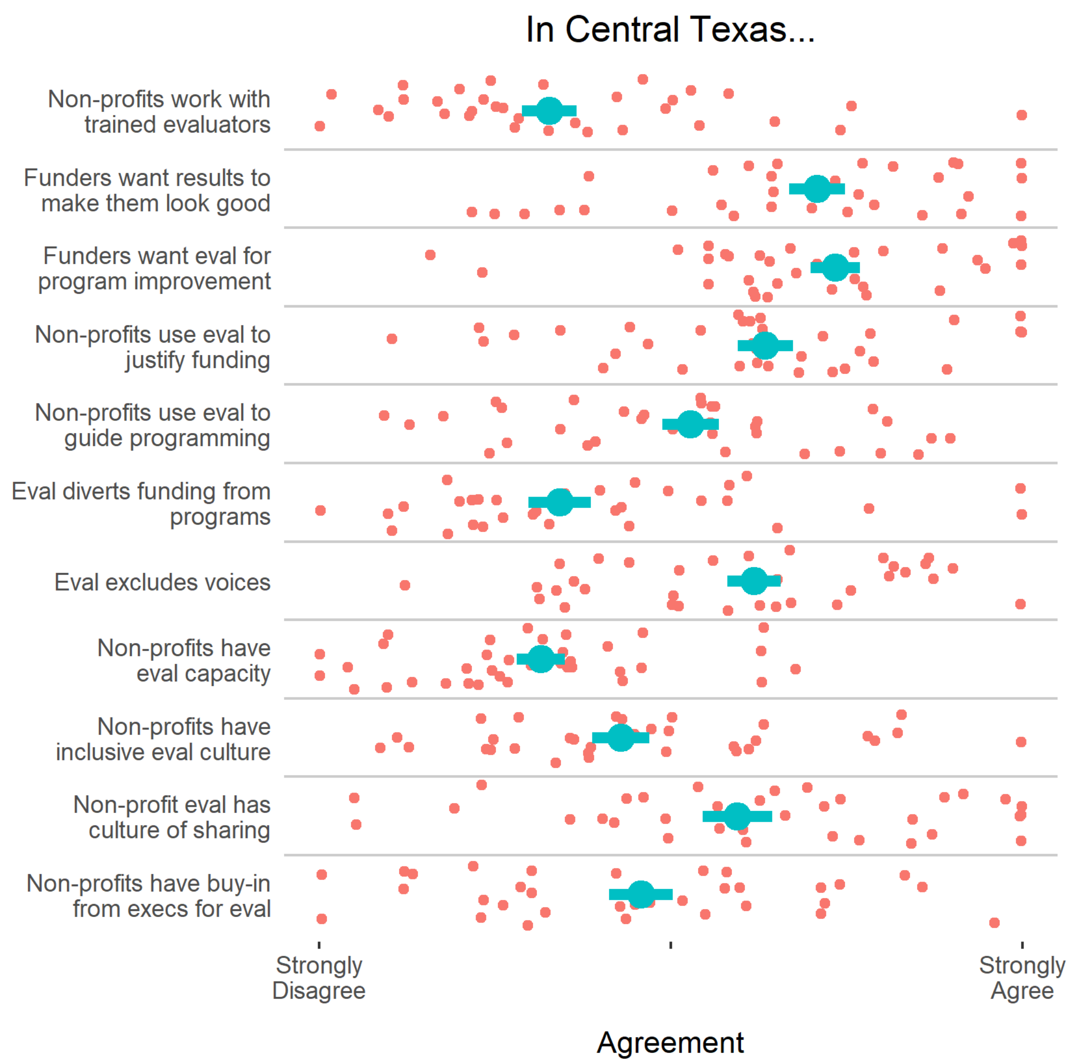

Figure 3. Beliefs about the status of evaluation in Central Texas non-profits. Blue point and whiskers represent mean response and confidence interval. Orange points illustrate the broad range of individual responses.

An external observer who provided critical review of the findings noted that funders may be engaged in a "dance" with non-profit leaders where neither group wants to fully embrace impact evaluation because both believe the program is working and do not wish to find data that could challenge their assumptions. They considered this issue a funder communications challenge since non-profit executive directors may perceive that any evaluation that suggests change or alteration might also imperil funding. They suggested broaching this topic when communicating with non-profit leaders about how to manage those discussions productively with funders. This individual noted this challenge will continue to limit change, especially for small funders who may not feel they have the skills to understand more service population-focused data or whose funding is reported as a part of a larger program.

An observer also noted that philanthropy in Central Texas seems to be changing rapidly, with younger leaders being more interested in impact and improvement focused data. This trend suggests a positive future as non-profit leaders learn to talk with these new voices.

Increased Engagement with Mission Capital

As noted in the introduction, the concept of an evaluator's community of practice in Central Texas was not supported by our data. The response rates throughout this project suggested that Mission Capital is perceived as a valued asset for providing direct support to non-profits, but not necessarily part of the culture of non-profit collaboration and reciprocity.

In this section, we explore this idea from two perspectives. First, we focus on what we learned from the open-ended responses to our surveys and discussions about Mission Capital itself. Second, we consider the relationship of evaluators to "a community of practice" that Mission Capital might be perceived as adjacent to or supportive of.

When asked whether they felt that they were part of a community of evaluators in Central Texas, alumni gave surprisingly varied answers that ranged from complete disagreement to complete agreement. These responses were accompanied by statements suggesting that participants often did not perceive themselves as evaluators or did not have a dedicated evaluation team that they work with regularly. This may have prevented non-profits from doing the work of investing in and building a community of practice. As one participant said,

> *"Evaluation is just one small piece of my work. We don't have dedicated evaluators so connecting with a community of evaluators may not always make sense. It may make me feel more isolated if other orgs have people that do this 100% of their time. We don't have that luxury."*

Alumni were uniformly appreciative of all the offerings from Mission Capital and the value that its programs bring to their work. Some had difficulty distinguishing between Good Measure, MWM, and Mission Capital. Based on the dialogues, these results should not be construed as negative, but rather, a perception that Mission Capital is considered useful on an a-la-carte model as needs emerge, but not necessarily a partner. They seemed confident in their awareness of who funds Good Measure and for whom it works.

In a follow-up personal discussion on this finding with external observers, a CEO whose staff have participated in MWM noted that they could not find a direct relationship between MWM program and their organization's priorities for fundraising and service provision. They also claimed that they could not pinpoint specific outcomes for their organization from their participation in MWM. They wanted more information on how the program has transformed other organizations to help them better appreciate the value of attending MWM and applying the lessons learned in their non-profit.

We heard frequently that senior leadership engagement with Mission Capital is essential for implementing MWM programming after training is complete. Common suggestions that emerged, in a variety of data gathering settings, included requiring CEO participation in a kick-off and conclusion program as part of the organization's commitment to the program. Respondents suggested including opportunities for CEOs to engage with Good Measure in an "after action" follow-up discussion with Good Measure on impacts, outcomes, and changes, to help guide their attention toward the work. The CEO also suggested that, because MWM incurs no out-of-pocket costs beyond staff time, it may be easier for a CEO to authorize attendance without committing to providing additional support for their staff after training.

One CEO, whose staff participated in the MWM training said,

> *"Sometimes I haven't felt a part of it because I kind of feel like 'Oh, these are the evaluators,' the Mission Capital people that are talking to us, and I'm just the non-profit person who is fundraising and then community, you know, and doing this on the side."*

We found that many alumni did not necessarily consider themselves to be "evaluators," and were unsure whether they wanted to participate in a "community of evaluators." This response offered some insights into our lower than anticipated response rates, suggesting that one possible reason for non-participation may be the self-perception that the surveys and questions sent by our team were meant for "evaluators" rather than individuals who may have attended the program but do not self-define with that identity.

One focus group participant explained that in working with clients, they constantly interacted with qualitative data, but that this felt different than having a defined role as an "evaluator." Respondents noted that there are differences in the day-to-day experience and needs of someone working full-time on evaluation and someone balancing it with a wide variety of job duties.

Some participants also highlighted differences in the needs of organizations working with different populations which can impact evaluation in practice. For example, within the education sector, an organization working with middle- and high-school students faces very different obstacles than one working with college students. There may also be unique requirements for some sectors that limit the kinds of evaluation that non-profits can do. For instance, we heard from some alumni that work in non-profits focused on education that they could not use some of what they learned from their participation in MWM due to requirements of the school districts and their funders. The few participants from this sector all seemed to suggest that they valued the learning from MWM but did not see a long-term relationship or a route to implementation after they returned to their daily practice. Good Measure may need to develop specific goals that help situate a narrower suite of opportunities for these alumni to continue their engagement after participating in MWM.

The experiences of alumni from education-focused non-profits has broader implications for evaluators that wear many hats or find themselves in more direct client service roles. It suggests that these alumni more frequently might require different ways of engaging with Good Measure that acknowledge that evaluation is one part of a larger work world.

It is important to note that this report is based on data from and discussions with a limited group of alumni, many of whom had also participated in Data Leaders Academy or presented at a Mission Capital or Good Measure event. These individuals gave consistently positive feedback about these opportunities, adding that they would like more "follow-up" meetings of this type after completing MWM. Given the small sample size, it is possible that these data under-represent the impact on alumni for whom evaluation is only part of their work and therefore did not see themselves as the target for the survey. As one focus group participant said,

> *"When [colleague] and I joined the Data Institute or Measuring What Matters, I felt that I almost have to show my credentials to say, 'Yes, I can, I can be there because this is who I am. And this is what I know. And I qualify.'"*

Existing Communities of Practice

Among those who felt most strongly that they belonged to an evaluation community, several mentioned a group called the ***Evaluators Breakfast Club***. They described it as an informal group created independently of Mission Capital and Good Measure, advertised through word of mouth, that holds bi-monthly gatherings and has a listserv where evaluators can share resources and ask questions. Although the group welcomes new members, most of our focus group participants had never heard of it.

This informal community group emerged from discussions between several alumni and their friends who work in non-profit evaluation. While the group did not attribute their foundation to MWM, the overlaps with alumni are important and represent the values of user-centered practices and community self-direction that are at the heart of the MWM pedagogy. In other words, the Evaluators Breakfast Club seems to represent exactly the type of client-centered community that MWM seeks to foster among the non-profits who receive training support.

Members of the club who were part of the evaluation said that while the group was valuable, meetings were infrequent and held during work hours, which made it difficult for all their colleagues to participate. They appreciated the semi-active email listserv as a less time-restricted form of participation. All members of the group suggested that Good Measure might consider creating a similar mailing list or forum for non-profit staff to participate asynchronously. As one respondent commented, *"I feel like MWM and Good Measure have tried a lot of ways to keep alums engaged, but it is hard to participate with so many competing priorities, slack channels, zoom meetings, etc."*

As we noted earlier, there does appear to be a distinct culture of evaluators working in the K-12 systems. We observed other subcultures of evaluators in different non-profit sectors including health, financial literacy, and financial support. This seems to be an opportunity for MWM, Good Measure, and Mission Capital to consider how these sectors may be served as specific target groups and where cross-over connections can be built over time.

Our external observers also felt that Mission Capital could help scaffold low-capacity vs. high-capacity evaluation as separate groups, both at the non-profit and the funder side. They suggested that funders with smaller budgets may benefit from more advice on how to identify results from their "contribution" to larger programs, to reduce burden but still understand how they contributed to a larger outcome. This would help funders ask for reports that are general to a program, and attribution of their contribution as a percent of the total, rather than custom reporting for limited gifts. They suggested the need for more advocacy by Mission Capital for streamlined reporting to help them speak with the funder community.

Opportunities to Increase Equity & Inclusion

Alumni spoke positively about the direction Good Measure is heading in terms of the focus on diversity, equity, and inclusion. They had a few concrete suggestions for content to add to MWM. An alumnus who had attended the 2021 Data Leaders Academy described the data equity lens used by the course as very effective stating that "*if future cohorts of Measuring What Matters also do that, I think that's the right solution*." Another noted that several staff members at their non-profit benefited from implicit bias training offered by Good Measure (separate from MWM).

Most alumni we spoke to in focus groups work for non-profits with a strong focus on underrepresented populations, and thus have been aware of and working on DEI issues separately from MWM. One participant mentioned working with a non-profit focused on data around race and equity, while another said they had consulted with several Texas offices, including the Small Business Administration, to work on making programs more accessible to their service population. In one focus group, one individual brought up the topic of best practices for survey items on race and gender:

> *"We're struggling and we've struggled with for years, what race categories do we put out? You know, and we've got a population of people who identify as South Indian who say, Middle Eastern isn't enough, why isn't my option there. So that kind of inclusivity and standardization would be extraordinarily helpful."*

Though they did not identify major gaps in the MWM content, alumni saw the potential for increasing diversity in who is able to participate in the program. They acknowledged that some of the lack of diversity in the program is related to the general demographic distribution of non-profit staff. As one participant mentioned, "*When I go to sessions, whether virtually or in person, they tend to be predominantly white attendees. But that could be, again, there's not a lot of diversity in non-profit leadership.*"

One person mentioned that it would be "*amazing*" if organizations attending MWM were expected to send a team which reflected the demographics of their service population, but they acknowledged that this might not have the desired impact. "*You would have a bunch of people not show if you tried to do that, because they wouldn't be able to do it*."

Furthermore, MWM does require participants to hold one of several specific roles in their organization, which may also lead to a less diverse cohort. This was reflected in some of the comments we heard during the evaluation. As one focus group participant said, *"we just have so many people that really could benefit from some of these discussions that wouldn't be included in them."* For example, direct practice providers' close interactions with their clients provides a valuable perspective when thinking about and implementing new evaluation practices, but they are not currently eligible to attend MWM.

Focus groups pointed to the need to think carefully about who is being brought to the table to benefit from Mission Capital's programming – in terms of role within a nonprofit, but also which nonprofits are involved. One participant noted that Mission Capital had recently sent out an email about a "leadership circle" that was specifically for minoritized non-profit leaders and that this was a step in the right direction. However, several alumni emphasized that it is also important to consider "*who gets these Mission Capital newsletters*" and what barriers might prevent some organizations from participating. As one participant said, *"Without including community voice, we reinforce power and privilege. We can talk about evaluation as a learning journey BUT if we exclude the community, the learning journey is only for a select few."*

In both survey responses and focus groups, alumni pointed to a need for elevating the voices of their communities by bringing community members into the MWM experience to shape the evaluation process as well as provide feedback on programs. As one participant noted during a focus group,

> *"People always say, you know, the community that I serve is facing too many barriers to be a part of this. And yet, like, there are so many community groups that are formed, that people are facing all kinds of challenges. You just need to create the resources around them, and you need to pay them to be there. And you need to make sure that you have supports if they're in crisis to be able to support them. So, I think these issues are solvable."*

As part of our validation effort, we asked for critical review of our findings from a few observers from non-profits in the region. One individual suggested that the challenge faced by MWM was the traditional recruitment strategy that brought together more diverse groups rather than considering the value of recruiting specific cohorts who may face common challenges and cultural concerns. They suggested that MWM consider recruiting a Black serving cohort, a Latinx serving cohort, or an LGBTQAI serving cohort, so each group could learn and recommend culturally appropriate program modifications that meet the unique needs of their service community and cultures. Specifically, they noted,

> *Using more of a community-based approach might support that equity statement. But be culturally specific. Either LGBTQAI or Black for example, you need to work to create spaces of trust to really test what is needed for any group to really see themselves in the work.*

Another external observer noted that Mission Capital and Good Measure may be focusing too much on inclusive values and practices. They suggested that the community is aligned on these values and new norms, and that repeated revisiting of these topics was not contributing to change. They further suggested that modeling gentle correction and reporting on successes in practice would be more valued.

When brainstorming possible strategies for increasing equity, and without awareness of the current application design, one advisor suggested explicitly asking applicants about their actions related to equity. "*How are you operationalizing your equity statements? Could be a great question on an application.*"

Lastly, we note that one external observer raised a concern that some funders feel blamed or targeted as contributing to systemic racism. This was distinguished from white fragility and characterized as a micro-aggression that may undermine funder support.

Opportunities for Mission Capital: Improving MWM Programming

MWM alumni identified a lack of understanding from funders as one of the largest obstacles to implementing what they learned through the program. The evaluation requirements associated with grants are often not aligned with what matters to their organizations placing additional burdens on non-profits. Grantees are often expected to follow the funder's ideas as to what would benefit their service community rather than given the freedom to pilot new ideas and iterate based on feedback.

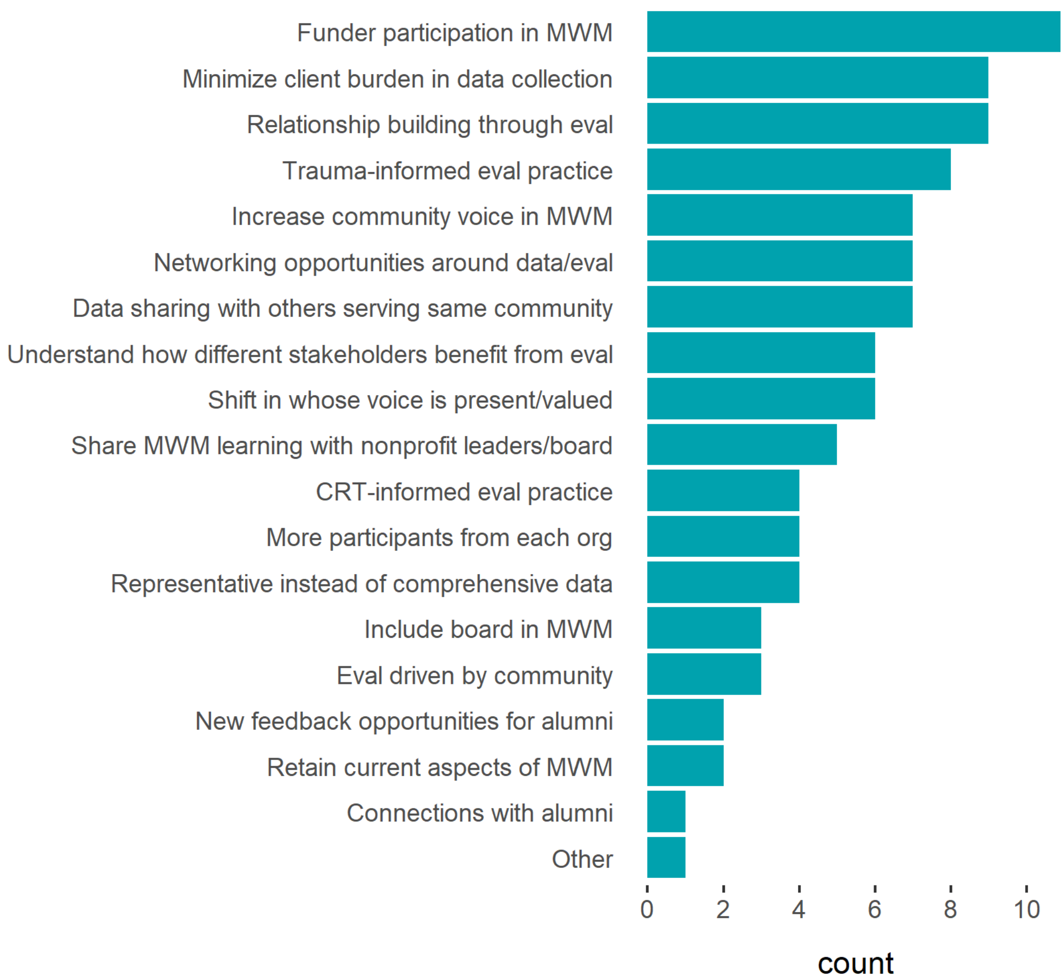

Figure 4. Priorities for improving Measuring What Matters. Respondents could select up to three options (n = 33)

While non-profits dependent on regular restricted funding are limited in the extent to which they can push back against these expectations, Good Measure is well-positioned to ***advocate for more client-centered evaluation and educate funders about best practices.***

In our survey, we asked respondents to tell us what they felt the priorities for improving future iterations of MWM should be. Figure 4 above shows their responses with the highest priority at the top. We received 33 responses to this survey question. As Figure 4 shows, most respondents think that funder participation in MWM is the highest priority followed by minimizing client burden in data collection and relationship building through evaluation.

In discussions with an external advisor willing to offer their perspective on the survey results, a few new ideas emerged, all of which seemed to center around the concept of "*building the market for MWM type evaluation*." The advisor felt that the challenge of advocacy should not be the responsibility of mid-level learners. It needs to be centered in independent outreach to funders, including government funders, and non-profit organizational leadership to address the systemic barriers reported by the MWM alumni.

Other suggestions included:

1) Commission analysis of current grant agreements gathered from alumni to identify where there are challenges and conflicts with the MWM model. This was offered to resolve the need for data that can be used by all non-profits to advocate for funding related to continuous program improvement. They imagined a report that includes model language for contracts that reflect MWM evaluation requirements, and examples of how implementation of MWM led to higher value in service delivery.
2) Mission Capital expand focus on government level funders and grant officers to discuss how MWM principles can be used to fulfill existing mandated evaluation requirements. They suggested developing guidance for how to work with the current legislated requirements; how to adapt evaluation to meet government requirements while applying MWM principles; and what it may take for government agencies to adapt their requirements to be more hospitable to MWM approaches. In making this recommendation, the external observers suggested that the volume of funding from government sources tends to dictate the degree to which MWM learning will find traction in any organization.
3) Encouraging ***more involvement from executive-level staff*** would help non-profits make lasting changes to their evaluation practice.

Some alumni said that the wide range of non-profit types in their cohort led to discussions that were less relevant for their specific organization. As mentioned earlier in this report, some MWM participants entered the program with a stronger base of knowledge about research and evaluation. This meant that the more basic topics that their peers in the cohort needed to cover were a less valuable learning experience to them. Similarly, the participating non-profits served different populations, and thus their evaluation needs varied widely. Some focus group participants noted that they would have preferred to participate with others working in a similar space, or more similar in size (one alumnus in a small non-profit was in a cohort with Goodwill a much larger organization) or region (some non-profits operated in more rural areas, while others were in Austin). Forming ***cohorts with non-profits who have more in common*** could improve the learning experience for participants.

Community-based Participatory Research & Evaluation

In this section, we offer an explanation of Community-based Participatory Research and Evaluation, with a few illustrations of our process.

As an organization, Knology is committed to working in collaboration with project partners to assess and understand the impacts of their programs. To that end, in all our work, we apply the principles of participatory action research to surface new insights that can lead to meaningful and lasting change. Participatory action research is an approach where stakeholders and evaluators collaborate to develop and refine core questions, contribute data, interpret results, and co-create the final research deliverable. For the MWM project, we applied principles from **community-based participatory research,** one of many participatory approaches like participatory evaluation and empowerment evaluation that center the work within the community that will benefit from the outcomes

There are different interpretations of community-based evaluation, which makes the concept challenging to define, but relatively easy to understand as a philosophy. Knology draws specifically from the body of research that defines it as a principle of inquiry that encourages all involved communities present in any situation to actively participate in the evaluation process.[1] Which is to say, an inclusive model of evaluation that accommodates both quantitative and qualitative methodologies, while allowing for variation in the nature of the actions and the individual perspectives of the participants representing the communities involved.

Principles of Community-based Evaluation

Part of what sets community-based research and evaluation apart is its distinct focus on a specific defined community. In this context, a community is defined as a group of individuals who share social, cultural, and/or economic ties and who may (or may not) share a physical location. Thus, an important first step in conducting this kind of evaluation is defining who is part of the community that is being evaluated.

There are several important principles that are required for conducting a successful community-based evaluation:

- Acknowledgement of the lived experiences of all stakeholders.
- Collaboration from all parties on the evaluation focus and agenda
- Cultivation and development of trust

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[1] For a good summary of the philosophy, see:

MacDonald, C. (2012). Understanding participatory action research: A qualitative research methodology option. *The Canadian Journal of Action Research*, n*13*(2), 34-50.

Cordeiro, L., Soares, C. B., & Rittenmeyer, L. (2017). Unscrambling method and methodology in action research traditions: theoretical conceptualization of praxis and emancipation. *Qualitative Research, 17*(4), 395-407.

The MWM project embodied these principles through various strategies used in the co-design sessions, focus groups, and surveys. For example, Knology researchers developed the survey and focus group instruments based directly on the conversations, evidence, and descriptions of impact observed by members of the co-design sessions. The co-design session included observations by both alumni in their community, and funder voices. After synthesizing these recommendations, using the language from the meeting, into a survey tool, we conducted multiple rounds of review with the different stakeholders to refine the questions. This ensured that the questions accurately captured the diverse experiences with the program, the language that would be expected from the range of participants, and alternative ways that impact may be evident to the alumni, their organizations, or their funders.

The collaboration with a range of stakeholders made it possible to change the evaluation plan when it became clear from the content of community response and the low response rate that the initial approach would not yield the most meaningful results. The feedback from all the stakeholders made it possible for Knology to work with Mission Capital and the Good Measure advisory group to identify the best course of action for the evaluation that would provide MWM with concrete recommendations for ways to improve its programming. We revisited these decisions multiple times over the course of the evaluation, as new evidence emerged.

The Role of the Evaluator

The success of a community-based evaluation does depend, in part, on the skill of the evaluator. Some of the key responsibilities of the evaluator include:

- **Facilitating, supporting**, and **engaging** in the problem-solving aspects inherent in all aspects of the evaluation, rather than accepting definitions of activities, objectives, or criteria developed by others;
- Serving as a **collaborator** in the process of **capacity building** and empowerment that ideally fosters skill development and self-determination; and
- Evaluators' ability to draw from an **eclectic "toolbox"** of knowledge and skills that support engaging community stakeholders in a flexible, yet rigorous evaluation process.

Planning a Community-based Evaluation

During the preliminary stages of planning a community-based evaluation, there are three key tasks:

- The identification of stakeholders
- Articulate the goals and objectives of the project; and
- Examine the extent to which there is agreement on these goals and objectives

The primary objectives of a community-based evaluation project are often not limited to acquiring new information for decision-making purposes. (e.g., could be identifying nuances of specific cultural contexts, relationship building). Thus, **the selection of the appropriate evaluation methodology and design**, needs to be handled thoughtfully, accounting for:

- Stakeholders' motivations for involvement and the skills they bring to the evaluation
- Anticipated learning and capacity building
- Available community-specific resources

- The dynamics of the cultural context.

We had high hopes for engaging with the majority of MWM alumni but learned that this group was not responding as anticipated. Those who did respond were actively supportive of the evaluation and gave graciously of their time and expertise.

By involving evaluators in the co-design, we were confident that we had a skilled team able to look at the questions from within their lived experience. Unfortunately, we were unable to generalize to the entire population because, as one of the co-design participants noted, we did not have the diversity of the community present in our group.

Since our available community-specific resources were limited, we adapted the evaluation to capture the dynamics of the cultural context and the disparities across the service populations more accurately. The Good Measure and Mission Capital teams embraced these challenges and worked with Knology on alternative ways of witnessing impact. The updated evaluation expanded to include funders, critical advisors, and organizational leadership to capture a fuller picture of the non-profit evaluation landscape.

Methodological Rigor

Extracting meaningful insights from community-based evaluation requires a mixed methods approach which blends both qualitative and quantitative studies. Two other concepts are important to consider:

Validity: To what extent can we attribute change to the specific intervention? The validation of a community-based evaluation project is not necessarily tied to descriptive numbers or significant statistics, but rather is rooted in the lived experiences of the community members. This can be gleaned through an iterative process of corrective feedback and review by evaluators and community participants. As an example, an element of a project will be considered valid if several people make the same observation and draw the same conclusions as the investigator and/or the community. In this case, we used our survey results to guide discussions with stakeholders in focus groups, and further reached out to critical advisors who were uninvolved in MWM training, but familiar with the evaluation culture of Central Texas. These individuals helped to ground truth the results that we have presented in this report.

Bias: It is important to consider the existing beliefs and worldviews of stakeholders in the community-based participatory action research that may influence the evaluation direction and results. Biases can be checked by engaging in a continuous process of revisiting roles in the evaluation and remaining open to changing research directions and learning from others. In this case, we revisited these issues during our meetings, changed Knology leadership of meetings and presentations to ensure we could hear different views and perspectives, and collaborated on memo development and recommendations for redirection with Mission Capital leadership to ensure we were controlling for potential bias.

Negotiating Group Dynamics

Recognizing existing power dynamics: Issues surrounding power and control are critical in community-based evaluation. Genuine partnerships are based on the recognition of power dynamics, and genuine collaboration necessarily involves a redistribution of power. The evaluator has a key role in facilitating this process. To support this work, Knology and Mission Capital staff worked to co-facilitate to ensure no single voice was too dominant.

Implementing strategies to ensure a balance of power: For community-based evaluation, arrangements and mechanisms are needed to ensure a balance among the interests of the stakeholders including researchers, funding agents, and members of the community. Possible mechanisms for ensuring the balance of power and resolving potential conflicts could involve:

- Establishing clear roles for all the participants
- Providing context and space for all different stakeholders to develop good working relationships
- Developing and maintaining open channels of communication and dialogue

Throughout the project, we maintained open communication, drawing in alumni across all phases of the work, and engaging with funders, stakeholders, and observers to validate what emerged from the participatory process. We used strategies including one-on-one discussions for conversations related to sensitive issues to ensure honesty and openness in reporting.

We believe that this report reflects the values of community-based participatory research, and that the findings reflect the range of beliefs and impacts of the MWM program. The range of responses to the surveys, and the rationales offered by community members seems consistent with the challenges of working as an evaluator during a global pandemic and the national reckoning with racism. Fortunately, despite these challenges the funding community and the non-profit sector both seem poised to accept greater focus on impact and program improvement measurements.

The results in this report suggest that investment in community organizing with non-profit sector leadership, evaluators, and funders, will increase the likelihood that an evaluation community of practice will emerge, for the benefit of all the service populations that rely on the Central Texas non-profit community.

Behaviors

Biosphere

Culture

Media

Wellness

Systems

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