Taking Action

Introduction

"We want to run the best organization that we possibly can."

(Quote from a project research participant)

Welcome to our "**Taking Action**" module! This module is one of eight online modules created as part of the "Developing a Culture of Evaluation" project. This project was conducted through a partnership between Community Literacy of Ontario and Literacy Link South Central.

Our "**Taking Action**" module, like all of the modules developed for this project, aims to provide practical, useful information, with a focus on small non-profits with limited budgets and limited staff resources. The modules have been written to meet the needs of the non-profit sector, as identified during online research, key informant interviews and a provincial survey conducted at the outset of our "Developing a Culture of Evaluation" project.

These are the eight online modules available from our project:

1	Introduction to Evaluation
2	Planning for Evaluation
3	Collecting Data
4	Analyzing Data
5	Taking Action
6	Communicating the Results
7	Case Study: The Evaluation Cycle in Action
8	Trends in Evaluation

We hope that these online modules are helpful to you in the important work that you do!

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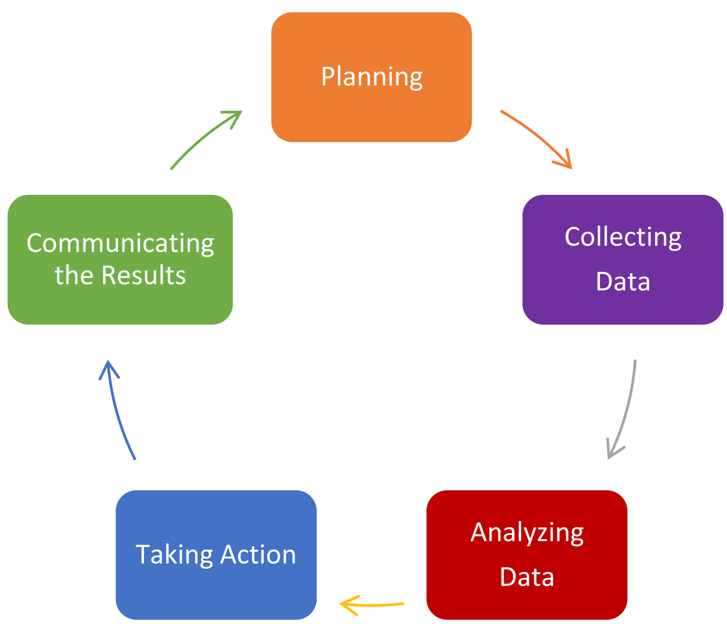
Module Overview

Acting upon your evaluation results is a critical part of the evaluation cycle. In response, we created our "**Taking Action**" module in order to help you implement the priorities identified during the evaluation process, with the end goal of creating a stronger, non-profit organization that better serves your clients and your community.



The following topics are covered in our "**Taking Action**" module:

- The Benefits of Taking Action
- Challenges to Taking Action
- Five Steps to Taking Action
    1. Assess What the Data is Telling You
    2. Set Your Priorities
    3. Develop Your Recommended Actions
    4. Create an Action Plan
    5. Implement and Monitor Your Action Plan
- Ongoing Communication
- Encourage Stakeholder Buy-in and Support

Module Overview

The Benefits of Taking Action

Our research for the "Developing a Culture of Evaluation" project included doing online surveys and key informant interviews with non-profit organizations in Ontario, conducting research via the internet, sharing ideas on social media, linking with subject matter experts such as the Ontario Nonprofit Network, attending conferences, and hosting an online discussion group and online clinics.

This research revealed that Ontario's non-profit organizations see many benefits from using the results of their evaluations, most importantly to:

- Assess and profile organizational strengths and successes
- Understand and work to mitigate organizational weaknesses and gaps in service
- Make informed, data-driven decisions about improvements or changes needed for their organization's programs and services, including:
  - Adapting/strengthening existing programs and services
  - Starting new programs, services and or partnerships to better meet the needs of their clients and community
  - Targeting new clients, volunteers, funders or other community members
  - Ending/changing programs and services that are not effectively serving their clients and communities
- Meet client, community, stakeholder and funder needs more effectively
- Report on organizational outcomes to funders as a requirement for continued funding or to encourage new sources of funding and support
- Showcase community impact and organizational outcomes to clients, staff, volunteers, the Board of Directors, partners and other stakeholders
- Promote a culture of lifelong learning and continuous improvement for Board members, staff and volunteers
- Provide a clear focus to organizational activities and priorities

Those are certainly a lot of very positive benefits! But, should you need any further convincing, be sure to watch this brief video, where the Knowledge Ninja presents a strong case for the benefits of taking action on your evaluation results.

Challenges to Taking Action

Have you ever been part of an evaluation process where there had been energy for planning the evaluation, and even some enthusiasm for gathering and analyzing data, but when it came time to implement the results of your evaluation… all of the energy and enthusiasm had somehow drained away? Perhaps your evaluation results, which began with such hope and promise, ended up sitting on a shelf. If any of this sounds familiar… don't worry, you are not alone!

In our research, non-profit organizations also told us that while they understood the benefits of evaluation, they still faced significant challenges to making it happen or taking action. The following challenges were consistently identified:

- Limited staff resources
- Limited time
- Limited financial resources
- Lack of experience/knowledge about evaluation

These capacity challenges apply to all aspects of the evaluation cycle, including "taking action". With limited staff resources, time and money, coupled with a lack of knowledge and experience, the job of implementing your evaluation findings becomes difficult. Just how can a small, non-profit organization find the time and capacity to do even more?

Our research findings co-relate with the fact that many non-profit organizations in Canada are small and lack capacity and resources. For example, Imagine Canada's research tells us that there are an estimated 170,000 non-profits and charities in Canada and half of these organizations (54%) are run entirely by volunteers. The larger non-profits overwhelmingly receive the bulk of funding, with the top 1% of organizations commanding 60% of all revenues.

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So what does this mean for taking action on evaluation results? It means that non-profits want to evaluate but lack the time and resources, and sometimes the skills to do so. Additionally, sometimes government mandated evaluation requirements are over-taking and precluding other kinds of non-profit evaluation. For example, during the research for this project, we found that 27% of respondents indicated that they did not conduct any forms of evaluation other than what is expected by funders.

To help overcome these barriers, we have written our "Taking Action" module, and all of the online modules for this project, with these factors in mind. In this module, we have created a step-by-step, user-friendly process for helping non-profits take the critical (but sometimes neglected) step of implementing their evaluation results.

We often use the word "stakeholders" in this module. The Oxford Dictionary defines a stakeholder as "a person with an interest or concern in something".

Five Steps to Taking Action

So, you've collected and analyzed your data and now it's time to take action! But where should you start? Taking action can feel daunting, so we've created a five-step process to help you (complete with user-friendly templates and examples). These five steps to implementing your evaluation results are:

- Step 1: Assess What the Data is Telling You
- Step 2: Set Your Priorities
- Step 3: Develop Your Recommended Actions
- Step 4: Create an Action Plan
- Step 5: Implement and Monitor Your Action Plan

Step 1: Assess What the Data is Telling You

During the data analysis phase of the evaluation process, you will have analyzed your data and prepared a written summary of the process and your evaluation findings. (See our "Analyzing Data" module for more information).

The first step to taking action is to carefully review the results of the data analysis and assess what the data is telling you. It would be wise, if possible, to involve a small group of stakeholders in this task, in order to encourage a culture of evaluation, gain buy-in and have access to diverse viewpoints.

Based on your data, consider, discuss and write down the answers to the following questions:

Template – "What is the Data Telling You?"
What is the data telling you about your organization's successes?
For example: • 89% of our clients believe we provide helpful services to them • 91% of our volunteers feel well-supported by us • 82% of our community partners indicate that we do a good job of promotion and outreach • 63% of clients prefer to learn via our new online tutorials, compared to print-based resources
What is the data telling you about the challenges facing your organization?
For example: • 62% of our clients and community partners find our website to be outdated and not user-friendly • The majority of our staff (72%) would like more opportunities for professional development • 42% of our clients would like us to be open on Saturday mornings • 67% of our volunteers do not like having to go through a formal screening process, including a police check

To learn more about how to assess what the data is telling you, see "[Evaluation Flash Card #23: Complete Evaluation Reporting]".

Step 2: Set Your Priorities

As you assess what the data is telling you about your non-profit organization in Step 1, you may come up with quite a long list of successes, challenges, issues and needs. Naturally, you can't do it all! The next step is to prioritize this information and come up with several recommended actions that are manageable for your organization to implement.

To help you prioritize actions to be taken, take the information gathered in Step 1, then use our "*Prioritizing Issues*" template on the following page to ask yourself, and your team, the following questions for each of the issues you identified in the "*What is the Data Telling You?"* template.

It's important to remember that you likely will not be able to do everything you identified during the evaluation process. Some identified issues may be important, but not achievable for your organization for a variety of reasons. Or, some issues may be important but, because of a lack of resources, perhaps they must be dealt with at a later date.

You can use our "*Prioritizing Issues*" template to keep track of what you decided to do, and what you elected not to do. It is important to capture both, and communicate the reasons to your stakeholders. This template will help you to focus not only on what is most important, but also on what is most manageable for you to undertake.

Prioritizing Issues Template

Sample Issue: 62% of our clients and community partners find our website to be outdated and not user-friendly		
Does this issue have a strong link to your organization's values and mission?	**Yes** Somewhat No	Notes: *Yes. An effective web-based presence is critical for us.*
Does this issue provide a clear benefit to your clients or other stakeholders?	**Yes** Somewhat No	Notes: *Yes. Our clients and stakeholders use our website to learn about our services.*
Would your key stakeholders be supportive if changes were made to this issue?	**Yes** Somewhat No	Notes: *Everyone understands the importance of an effective web-based presence.*
Do our staff members / volunteers / other stakeholders have the ability (time and skill level) to implement changes to this issue?	Yes **Somewhat** No	Notes: *One staff member and a volunteer have intermediate skills in this area. We can also ask our partners and our local college for potential support.*
Do you have the resources (financial and capacity) to address the needs identified in this issue?	**Yes** Somewhat No	Notes: *We have limited financial resources, but we have a strong network of volunteers and community resources we can draw upon.*
Do you have the ability to influence this issue or is it outside of your ability to control?	**Yes** Somewhat No	Notes: *We have complete control over our website and are limited only by our financial and HR resources.*
Is this an issue we can and should be addressing now?	**Yes** Somewhat No	Notes: *Yes. An effective web-based presence is critical for us.*

Based on the above, on a scale of 1 to 10 (with 1 being low, and 10 being high), what priority level would you assign to this issue? **Priority Level: Nine**

Step 3: Develop Your Recommended Actions

Once you've completed Step 2, and assessed the findings from your data using our "*Prioritizing Issues"* template, some clear priorities will emerge. It is these high priorities that should become your recommended actions.

For example, let's assume that the following four needs were selected as top priorities in Step 2.

Our Top Priorities for Action
1. 62% of our clients and community partners find our website to be outdated and not user-friendly
2. The majority of our staff (72%) would like more opportunities for professional development
3. 67% of our volunteers do not like having to go through a formal screening process, including a police check
4. 63% of clients prefer learning via our new online tutorials, compared to print-based resources

Through discussion and discernment, each of these issues should be turned into clear, strong, actionable recommendations by those involved in the evaluation process in your organization.

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Here are some sample recommended actions based on the evaluation priorities.

Our Recommended Actions
1. ABC Non-Profit will update its website in the next 6-month period
2. ABC Non-Profit will find creative ways to offer each staff person two professional development opportunities annually
3. ABC Non-Profit will educate its volunteers on the importance of the volunteer screening process
4. ABC Non-Profit will consider ways they can reallocate operating funds, or augment their budget with new sources of funding, in order to provide more online learning opportunities for clients

For a great resource on the art of developing recommendations, be sure to read "Recommendations that Rock", developed by Community Solutions.

Step 4: Create an Action Plan

The next step is to develop an action plan for each of your recommended actions. Planning is critical to successful implementation! This quote puts it well: "*A goal without a plan is just a wish.*" If you have a clear and specific action plan which establishes timelines, responsibilities and resources, then your chances of successfully implementing your evaluation results will greatly increase.

Developing an action plan does not have to be a daunting task. The plan can be short and simple. However, it needs to be clearly laid-out so that all stakeholders understand the what, why, how, who, how much and when of your plan.

An Action Plan should cover the following:

WHAT?

- What are you hoping to accomplish? This would be the specific recommended actions you developed in Step 3.

WHY?

- Why is this recommended action important to your organization? This is a brief summary of what you learned from looking at the data in Step 1.

HOW?

- What key steps will you need to take to accomplish your recommended actions? Depending on what you are trying to accomplish, this could involve minor or substantial tasks, and immediate or long-term activities.

WHO?

- Who is responsible for implementing each recommended action? This could involve one person or several people, depending on the scope of the activity involved. It could involve people internal to your organization (staff, volunteers, clients and board members). It could also include external stakeholders and partners.

HOW MUCH?

- What resources will you need to accomplish each recommended action? This could include financial resources, staff and volunteer time, meeting expenses, materials, promotion, etc. Given the small budgets of most non-profits, it may involve a reallocation of existing resources, or recruiting additional volunteers or community support.

WHEN?

- Set clear and realistic timelines for each recommended action.

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We have developed this handy template to help you develop your action plan.

Action Plan Template

WHAT? ABC Non-Profit will educate its volunteers on the importance of the volunteer screening process.

WHY? In our evaluation, 67% of our volunteers indicated that they do not like having to go through a formal screening process, including a police check.

HOW?	WHO?	HOW MUCH?	WHEN?
Contact Volunteer Canada to access their resources on why volunteer screening matters	• Administrative Assistant	Free	Immediately
Host a training event on the importance of volunteer screening	• Administrative Assistant will organize this event	• 30 hours of staff time • $200 in meeting costs	• Organizing in July / August • Hold event in September
Update volunteer training manual to include information on the importance of screening	• Volunteer Coordinator	• 15 hours of staff time	By September 30th
Research and find several online videos on the value of volunteer screening to be shared with volunteers	• Executive Director • Board of Directors	• 10 hours of ED time	By June 30th

Learn more from the Pell Institute on this important topic of developing action plans in their helpful resource called "Designing an Improvement Action Plan".

Step 5: Implement and Monitor Your Action Plan

So now you've set priorities and clearly determined tasks, timelines, resources and responsibilities in your action plan. Now, it's time to take the final step of implementing your recommended actions as outlined in your action plan.

In order to ensure that your action plan moves forward, it will be important to set up regular check-ins during implementation. This monitoring could occur during meetings with staff, volunteers and/or board members, or at a meeting of those involved with the evaluation process. It could also occur via email, telephone calls or informal meetings with the people most closely associated with each action item.

If recommended actions are not moving forward, check in with the person (or persons) responsible and request a status update. Perhaps unforeseen complications have arisen. For example, maybe the recommended action was more complex or time-consuming than anticipated, or other organizational issues prevented activities from occurring. Brainstorm solutions with those involved and consult with your evaluation team as needed.

If required, re-visit the action plan, and re-jig items and timelines as necessary. Offering a word of encouragement and practical support can help get the implementation process going again.

Regular check-ins and monitoring the action plan can serve as a great reminder to all stakeholders that your organization is committed to taking action for improvement. To build morale and to strengthen your evaluation culture, be sure to celebrate small successes and milestones along the way with your evaluation team. After all, you certainly have something to celebrate! You are working together on an important cause: improving your non-profit organization and the services it provides to your community.

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To help you monitor your action plan, we have prepared this handy template. It doesn't have to be complicated, but keeping track of key activities and milestones will keep everyone "singing from the same song" sheet, and it will keep your implementation moving forward.

Monitoring Your Action Plan Template		
ACTION: Host a training event on the importance of volunteer screening		
WHO?		
Our plan: • The Administrative Assistant will organize this event	**Actual:** • Administrative Assistant (marketing) • Volunteer Coordinator and a board member (organizing event)	**Notes / Follow-up / Changes:** • Our Admin Assistant only had time to help with marketing. • Volunteer Coordinator/ board member organized the event. • This event was more time-consuming than planned.
HOW MUCH?		
Our plan: • 30 hours of staff time • $200 in meeting costs	**Actual:** • 40 hours of staff time • $50 in meeting costs	**Notes / Follow-up / Changes:** • More staff time was needed • To reduce costs, a volunteer approached a grocery store to donate snacks and beverages for the meeting
WHEN?		
Our plan: • Event planning and organizing in July and August • Hold event in September	**Actual:** • Event planning and organizing in August and September • Event was held in late October	**Notes / Follow-up / Changes:** • Staff and volunteer holidays made event planning difficult in July/August • Event was rescheduled to late October

Ongoing Communication

As your organization goes through the steps of setting priorities, recommending actions, developing an action plan and implementing your evaluation plan, it is important to keep your stakeholders informed. Change can be a difficult process for people and openly sharing information is key to building a culture of evaluation and ensuring stakeholder and community support. When you communicate your evaluation priorities and the actions you are taking, you are also demonstrating that you are a transparent and accountable organization that believes in continuously improving your services.

Engaging in ongoing communication does not mean informing everyone of each minute detail and decision along the way. However, it does mean letting people know the broad strokes of what decisions you are making and what actions you are taking. Consider sharing out:

- The highlights of what you learned from the data
- Your priorities
- Your recommended actions
- Your action plan (or an executive summary of the plan)
- Updates on the results of the actions taken to improve your organization

Most non-profit organizations have only a small (or a non-existent) budget for communications. However, you can embed updates about the implementation of your evaluation in your regular communication tools (website, newsletters, annual reports, AGM, board meetings, social media, etc.). In this great example, see how the Toronto Public Library provides a succinct but informative "Consultation Update", via its website, which briefly shares their consultation process, their draft priorities and the next steps for action.

For creative and cost-effective ways to share how your organization is taking action on what it learned during the evaluation process, see our "Communicating the Results" module.

Encourage Stakeholder Buy-in and Support

As you evaluate priorities, develop recommendations and implement your action plan, it will be important to have the buy-in and support of your stakeholders. Everyone is different; some adapt easily to change, while others prefer to hang on to old ways. Some immediately recognize needed organizational changes, while others aren't easily convinced.

Here are some suggestions to help you build support for taking action on your evaluation results:

- Clearly communicate what the data told you about the need for organizational changes to build stakeholder buy-in for the recommended actions. If people can see data-driven, evidence-based reasons for the changes, they are more likely to be supportive.
- Demonstrate the clear links of the proposed changes and actions to your organization's values and mission.
- Clearly show how the recommended actions will provide benefit to your clients and others.
- Since most non-profit organizations have limited financial capacity to implement change, brainstorm ways to implement your action plan by reallocating existing resources (for example, is there anything you can stop doing?), or by engaging new volunteer and/or community supports. Be sure to communicate HOW the recommended actions are being resourced.
- Only implement changes for which you are sure you have adequate resources available. Your staff, Board of Directors and volunteers need to know that if change is coming, it is doable and manageable for everyone involved in the organization.
- Find and involve your organization's champions in the evaluation and implementation process.
- Keep stakeholders involved and informed, and be transparent during all phases of the evaluation process.

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- Continually reinforce WHY you are making changes. It is not about “change for change sake” but about improving your organization to better provide services to your clients and community.
- Ensure that your Board of Directors, as the leaders of your organization, play a prominent role in the evaluation process.
- Ensure that your evaluation data is reliable and legitimate (since you are basing your decisions for action upon this data). And be sure to communicate that your evaluation data is solid and reliable.
- Actively remind people that they are part of an organization that believes in lifelong learning and continuous improvement.

Conclusion

Taking action on your evaluation results is a critical, but sometimes neglected step in the evaluation process. We in the non-profit sector care deeply about our clients, our communities and our organizations. Yet, for small non-profits, it can sometimes feel daunting to find the time to implement evaluation results. But take heart! Follow the simple and straightforward steps highlighted in this module to help you take the most important evaluation step of all: taking action to improve your non-profit organization.

Be sure to continue the conversation on evaluation in non-profit organizations. Here are some ways to do that:

- During the life of the "Developing a Culture of Evaluation" project (it ends in March 2017), visit our website to join our online discussion group, online clinics and/or webinars so that we can continue to learn together.
- Stay connected with the Ontario Nonprofit Network, Imagine Canada and other organizations with an expertise in non-profit evaluation.
- Participate in conversations about evaluation. Talk to your fellow non-profit organizations, as well as your volunteers, Board of Directors, funders, donors and community members.
- Share your thoughts with us via our Facebook page or on Twitter.

"It's important to evaluate programs and services so we are providing what our clients need and that changes all the time, and the people we serve changes."

(Quote from a project research participant)

Additional Resources

- Evaluation Module 3: Using Evaluation. An online training module by the Ontario Centre of Excellence for Child and Youth Mental Health.
- Evaluation Toolkit – Communicate and Improve. By the Pell Institute and Pathways to College Network.
- Key Factors for Implementation. By the Ontario Centre of Excellence for Child and Youth Mental Health.
- Package of Evaluation Resources. (See in particular "Part 1: Evaluation backgrounders"). By the United Way Toronto and Cathexis Consulting, May 2014.
- Program Evaluation Toolkit. (See especially "Phase 3: Using Evaluation"). By the Ontario Centre of Excellence for Child and Youth Mental Health.
- Develop an Action Plan / Factors That May Influence Implementation. By Substance Abuse and Mental Health Services Administration.

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