

LESSONS LEARNED EVALUATING AN ENVIRONMENTAL THINK TANK/ADVOCACY ORGANIZATION

1.2. EMBEDDING EVALUATION AND LEARNING INTO ORGANIZATIONS

THURSDAY, JUNE 23, 2011

ENVIRONMENTAL EVALUATORS NETWORK FORUM

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EVALUATION PHILOSOPHY

- Focus on learning (vs. accountability)
- Be participatory, and build capacity
- Right-size approaches
- Translate theory into practice
- Evaluation should be systematic, ongoing, and used

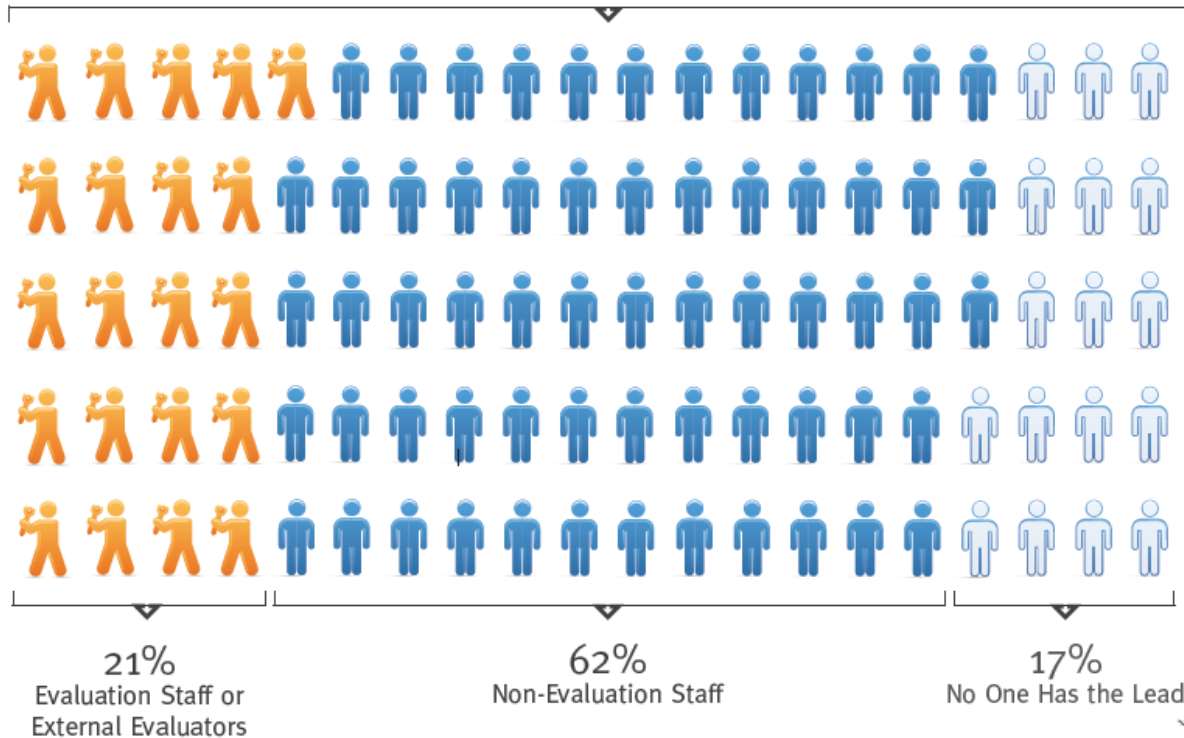
CAPACITY TO EMBED EVALUATION



- 501(c)3 organizations
- 1,072 responses
- Time period of interest: January 1 to December 31, 2009

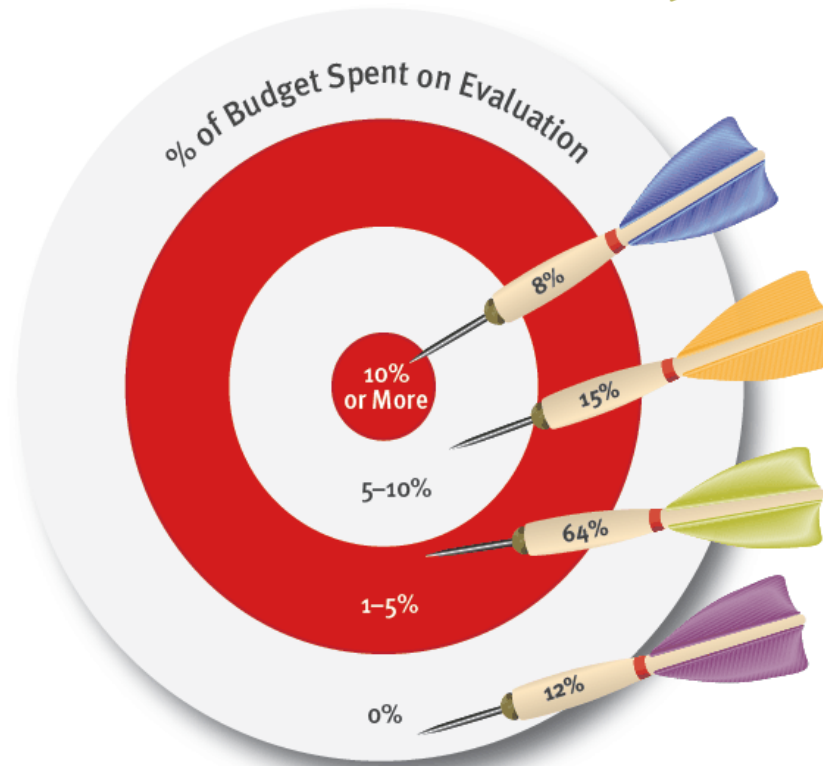
CAPACITY TO EMBED EVALUATION

Professional evaluators are responsible for evaluation
in only 21% of organizations. (n = 899)



CAPACITY TO EMBED EVALUATION

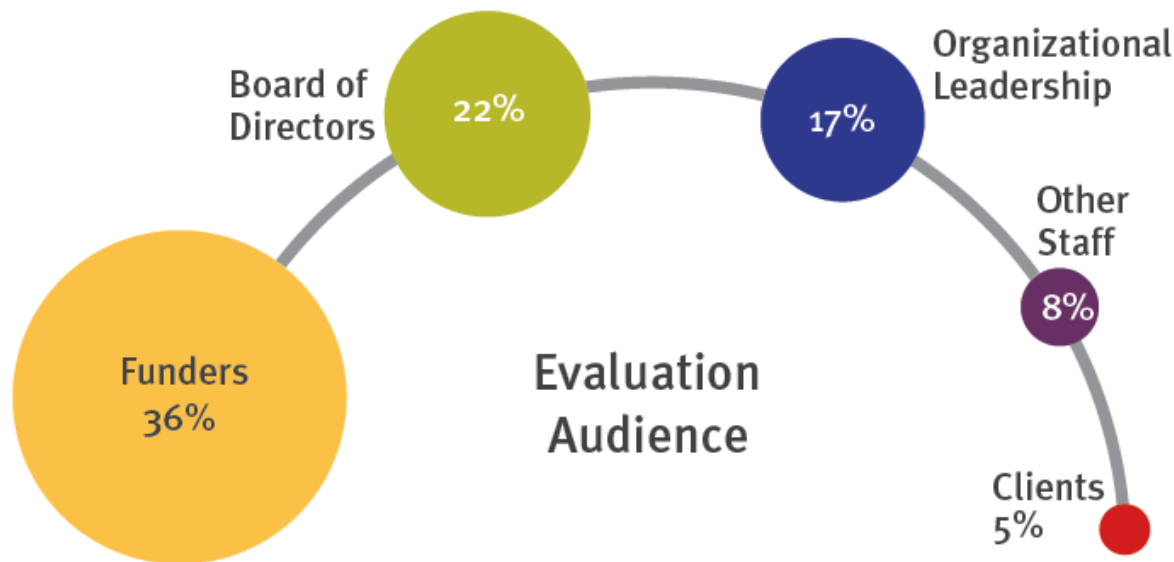
In 2009, **1 in 8** organizations spent **no money** on evaluation. (n = 858)



CAPACITY TO EMBED EVALUATION

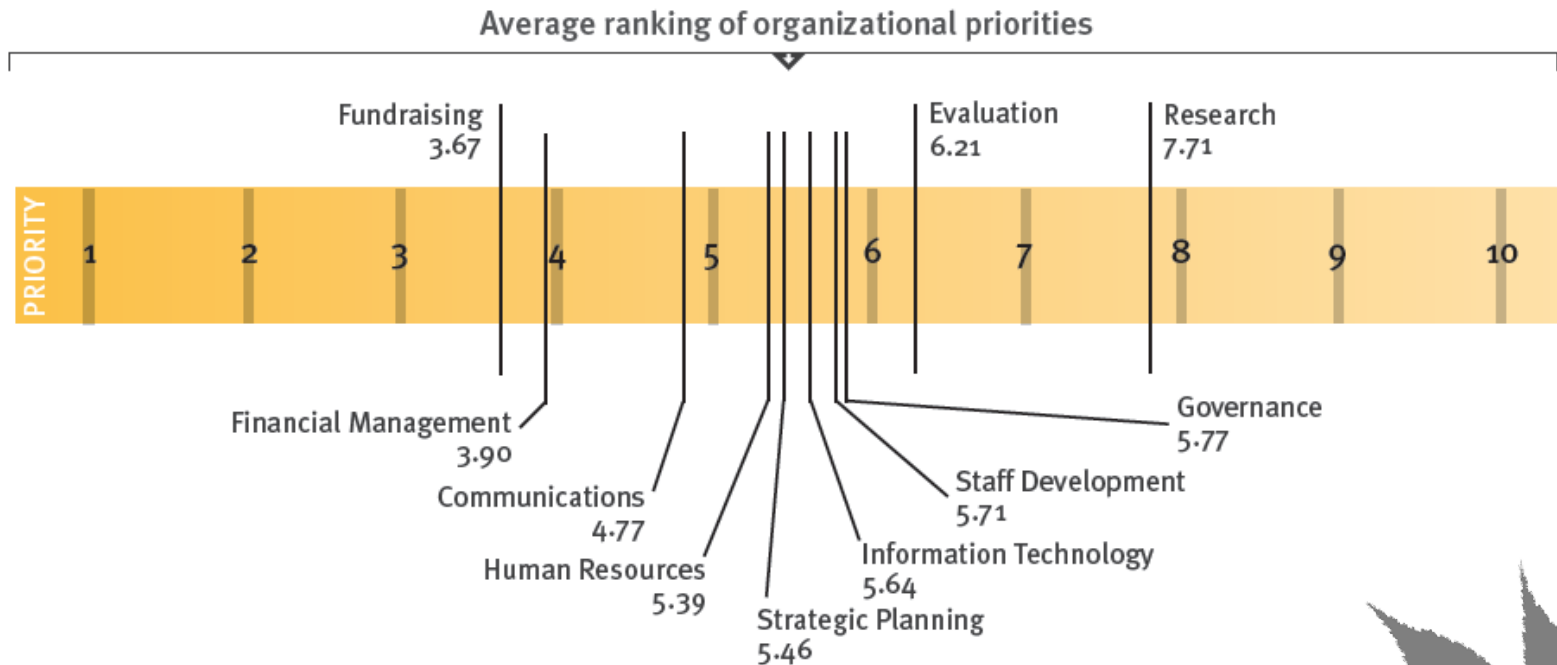
Funders were named the highest priority audience for evaluation.

(n = 786)



CAPACITY TO EMBED EVALUATION

Evaluation is the **second lowest organizational priority**—
only more important than research. (n = 753)





REQUEST FOR ASSISTANCE

- Spring 2010: Request from the Post Carbon Institute for assistance developing an **internal evaluation and reporting system**
- Desired impact: Relocalize communities and adapt to an energy constrained world
- Initial conversation emphasis: Post Carbon is a **think tank—*not* an advocacy organization**



PROJECT APPROACH

- ① Establishment of an evaluation workgroup
- ② “Getting to know you” checklist
- ③ Planning: Series of discussions (e.g., project purpose, possible approaches, pros, cons)
- ④ Data Collection: Interviews
- ⑤ Analysis: Creation of theory of change and evaluation plan
- ⑥ Review and fine-tuning with the evaluation workgroup



THINK TANK EVALUATION

Donald E. Abelson (2010). *Is Anybody Listening? Assessing the Influence of Think Tanks*. Chapter 1 in the edited volume, *Think Tanks and Public Policies in Latin America*.

Peter Boyd (2010). Personal correspondence.

Richard Bumgarner, Douglas Hattaway, Geoffery Lamb, James G. McGann, and Holly Wise (2006). *Center for Global Development: Evaluation of Impact*. Arabella Philanthropic Investment Advisors, LLC for the Bill & Melinda Gates Foundation, the William and Flora Hewlett Foundation, the John D. and Catherine T. MacArthur Foundation, and the Rockefeller Foundation.

Ingie Hovland (2007). *Making a Difference: M&E of Policy Research*. Working paper 281 for the Overseas Development Institute, London, UK.

James G. McGann (2006). *Best Practices for Funding and Evaluating Think Tanks & Policy Research*. McGann Associates for the William and Flora Hewlett Foundation.



THINK TANK EVALUATION

	Bumgarner et. al. (2006)	McGann (2006)	Hovland (2007)	Abelson (2010)	Boyd (2010)
Organization infrastructure, capacity, and management		✓	✓		
Strategy and direction— <i>at both the organization and project levels</i>			✓		
Organization visibility and reputation				✓	✓
Effectiveness of communications and outreach strategy	✓				
Quantity of research products		✓	✓		
Participation in congressional testimony				✓	
Research relevance, quality, usefulness, and rigor	✓	✓			✓
Uptake of research in media and policy			✓		
Research influences the work of other leading researchers	✓				
Research influences decisionmakers and/or policy		✓	✓	✓	

ADVOCACY EVALUATION



Extended time frame



Contribution, not attribution



Sustainability



Ability to gauge progress



Acknowledged risk taking



STAKEHOLDER INTERVIEWS

Areas of inquiry:

- Perception of PCI's mission and work
- What success may look like in five years
- Interim steps along the path for the five year goal
- Connections from PCI's current work to interim steps and five year goals
- Assumptions and challenges inherent to work in PCI's field

Mix of familiarity: 5% not very familiar /
25% somewhat familiar / 70% very familiar



THEORY OF CHANGE

Mission: To provide individuals, communities, businesses, and governments with the resources needed to understand and respond to the interrelated economic, energy, and environmental crises that define the 21st century. We envision a world of resilient communities and re-localized economies that thrive within ecological bounds.

INFLUENCE AUDIENCES

- Nonprofit Organizations and Funders
- Individuals and Communities
- Local, State, and Federal Governments
- Academics and Prominent Voices in Related Fields

STRATEGIES

Analysis and Synthesis
Create high quality research products that connect the dots between economic, energy, environmental, and (in)equality issues

Fellows
Link fellows and their networks. Integrate, share, and amplify fellows' work and ideas. Learn from and draw on fellows' expertise to inform PCI's work

Relationship and Partnership-building
Build and sustain relationships with influencers and decisionmakers—in federal, state, and local government, in business, in the media, and among nonprofit and funding organizations

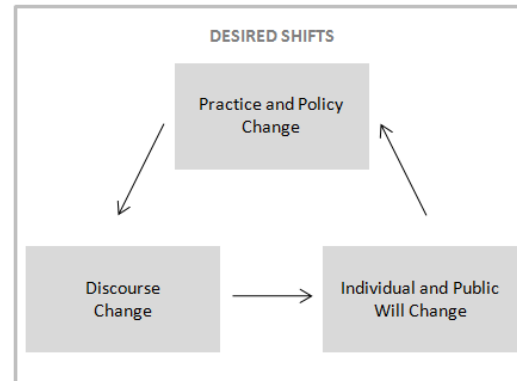
Communications
Effectively communicate with audiences to promote spread and uptake of messages

Link to Actionable Information
Link to practical, actionable information from like-minded peers

Credibility and Visibility
Strengthen and grow organization and fellows' credibility and visibility

Organizational Strength and Capacity
Grow and prepare PCI so that the organization can continue to operate through the systemic shocks resulting from economic, energy, environmental, and (in)equality crises of the 21st century

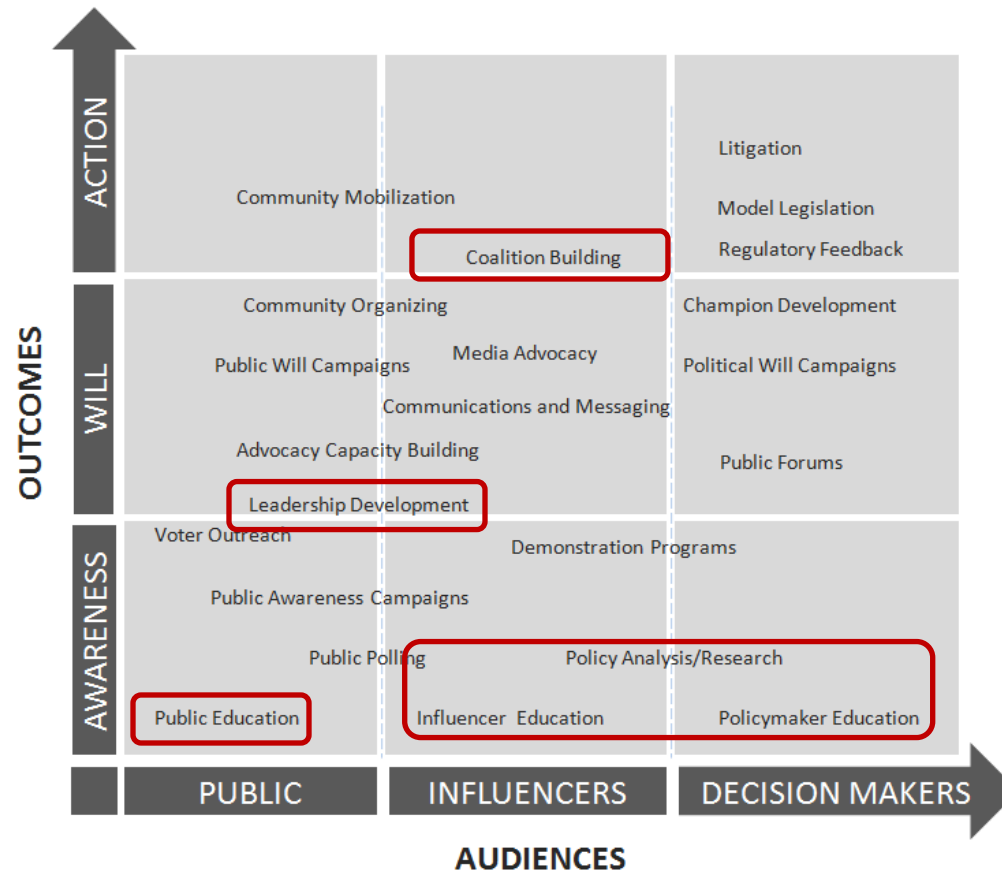
IMPACT
Resilient communities and re-localized economies thrive within ecological bounds



Focusing Events, Crises, and Windows of Opportunity

- Direct attention to economic, energy, environmental, and (in)equality issues
- Create awareness and interest in the solutions offered by PCI
- Contribute to individual and public demand for change

ADVOCACY STRATEGY FRAMEWORK



The Advocacy Strategy Framework was developed by Julia Coffman, jcoffman@evaluationinnovation.org.



RECOMMENDED DATA COLLECTION

① Ongoing

Examples: Meeting Tracking Form, Inquiry Tracking Form, Online Content Tracking, Policymaker Ratings, Network Mapping/Analysis, Website statistics

② Annually


Examples: Bellwether Interviews, Annual Partner Survey, Capacity Assessment, Readiness for Learning and Evaluation Assessment

③ As needed

Example: Intense Period Debrief



LESSONS LEARNED / REFLECTIONS

- Value in theory of change **process** and **product**
 - Process uncovered that stakeholders had **varying assumptions** about target audiences, strategy purpose, and desired shifts
 - Process highlighted the need for evaluation planning to be iterative: **the more developmental the work, the more rapid the iterations of evaluation planning**
 - When strategy is quickly evolving—which is often the case in advocacy/systems change work—**the design and implementation of data collection is a lower priority** to staff than strategy revision
 - A functional evaluation system is more likely to be sustained if data collection is designed to **focus on core activities, strategies, and outcomes that are cross-cutting**, e.g. champion development tracking
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RESOURCES

- Innovation Network, www.innonet.org
- Center for Evaluation Innovation, www.evaluationinnovation.org
- American Evaluation Association:
 - Environmental Program Evaluation (EPE) Topical Interest Group (TIG), <http://comm.eval.org/EVAL/environmental>
 - Advocacy and Policy Change Topical Interest Group (TIG)
- Post Carbon Institute, www.postcarbon.org

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THANK YOU!



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