**2011 EEN Forum Notes**

**Session Name**: Embedding Evaluation and Learning Into Organizations

**Speakers**: Johanna Morariu, Innovation Network, Inc.

Amielle DeWan, Rare

**Session Date/Time**: 6/23/2011, 1:15 PM

**Note Taker**: Jake Lyonfields

**Main Themes**:

* Understanding Goals and your Evaluation Philosophy
* Developing a Theory of Change with clients/organization members
* Using SMART objectives and Good Metrics for each step in the Theory of Change
* Struggling with Metrics

**Detailed Notes**:

1. Lessons Learned Evaluating an Environmental Think Tank/Advocacy Organization

* Evaluation Philosophy
  + Focus on learning vs accountability – much more helpful to organizations, and there is inherent accountability with learning
  + Be participatory, and build capacity – participatory data analysis have been very helpful for clients b/c clients get more out of it
  + Right-size approaches – by cost
  + Translate theory into practice – take information from journals and academic presentations, but apply that to the organizational setting
  + Evaluation should be systematic, ongoing, and used!
* Capacity to Embed Evaluation – conducted a field survey in the 2009 calendar year
* One of the first things asked in the field survey is, “Do organizations have a person in charge of evaluation?” Also, 1/8 of organizations spent no money on evaluation. Guidance typically recommends spending 10% of program budget on evaluation. Out of the top ten priorities, evaluation ranked second-lowest
* Case example: Post Carbon Institute asked for assistance developing an internal evaluation and reporting system. No evaluator on staff, and they emphasized they were a think tank, not an advocacy organization.
* Project Approach
  + Evaluation Workgroup established
  + “Getting to know you” checklist
  + Planning: Series of discussions (eg project purpose, possible approaches, pros, cons)
  + Data Collection: Interviews with individuals in the organization
  + Analysis: Creation of theory of change and evaluation plan
  + Review fine-tuning with the evaluation workgroup to deliver to organization
* Literature evaluation, however, not much of it for Advocacy Evaluation
* Continued to believe throughout the evaluation that they were indeed an advocacy group
  + Advocacy evaluation process: (1) Extended time frame, (2) Contribution, not attribution, (3) sustainability, (4) ability to gauge process, (5) acknowledged risk taking
* Stakeholder interviews done and collected and coalesced into a theory of change
* Client thought it was important to focus on events, crises, and windows of opportunity
  + Can often be gaps in between highlighted press activities, so it can be hard to sustain the organization. Clearly, this was a major part of PCI’s
* Lessons learned:
  + Ongoing: Meeting tracking forms, Inquiry tracking form, Network Mapping/Analysis, and others
  + Annually: Bellweather Interviews, Annual Partner Survey, Capacity Assessment, Readiness for Learning and Evaluation Assessment
  + As Needed: Intense Period of Debrief
  + Aside: Julia Coffman, Evaluation Innovation – Good resource
* Value in Theory of Change Process and Product
* Process highlighted the need for evaluation planning to be iterative
* Resources
  + Innovation Network: [www.innonet.org](http://www.innonet.org)
  + Center for Evaluation Innovation website

1. Cohorts, Control Sites, and Conservation Effectiveness: Navigating Complexity with Repeatability

* Rare places emphasis on evaluation in conservation effectiveness
* Roadmap: Background and Context, Key Challenges, Solutions (theory of change, cohorts and control sites, scorecards)
* Mission: “To conserve imperiled species and ecosystems around the world by inspiring people to care about and protect nature”
* Question: How do we get people to adopt conservation on the scale we need to succeed?
* Rare trains local partners and leaders to run social marketing campaigns with a goal of changing behaviors and reducing threats to biodiversity – called “Pride Campaigns”
* Rare’s Strategy Map: Conservation, Capacity, Constituency Building. Also focus on expanding fundraising and organizational capacity
* Evaluation Philosophy – same as Johanna Morariu’s work:
  + Focus on learning vs accountability – much more helpful to organizations, and there is inherent accountability with learning
  + Be participatory, and build capacity – participatory data analysis have been very helpful for clients b/c clients get more out of it
  + Right-size approaches – by cost
  + Translate theory into practice – take information from journals and academic presentations, but apply that to the organizational setting
  + Evaluation should be systematic, ongoing, and used!
* Evolution of Pride: Added a Theory of Change, SMART objectives and indicators, Control Sites, and Thematic Cohorts: Marine Momentum.
* Rare has conducted 150+ campaigns: ie logging, overfishing, poaching, and habitat loss
* Key Evaluation Problems: Metrics, Time-scale for measurement, Impact Assessment, Consistency, Funding, Variability, Stochasticity
* Solutions to these problems follow below
* Evaluation for Rare means Theories of Change: “A Theory of Change is a specific and measurable description of a social change initiative that forms the basis for strategic planning, on-going decision-making and evaluation”
* Knowledge + Attitude + Interpersonal Communication + Barrier Removal -> Behavior Change -> Threat Reduction = Conservation Result. Rare asks questions for each of these steps
* NOT just about education; it’s about social marketing
* For each step in the theory of change, Rare uses SMART objectives and a good Metric.
* Rare conducts samplings and does measurements
  + Probabilistic interview surveys
  + Robust sampling questions
  + Pre and Post campaign to evaluate impact
* Correlation vs Causation important to note
* Campaign: Marine Momentum
  + 3-4 regions, 60 campaigns/yr, artisanal fisheries, costal reefs
  + Similar metrics, evaluation
  + Trying to identify Pride campaign impacts
* Going to contrast this with control sites to see if Pride Campaigns are having an impact
* Pride campaigns are also evaluated with internal scorecards

**Points for Discussion**:

1. What is the Pride Campaign Methodology? (PRIDE CAMPAIGN)
   1. Identifying target audience
   2. Educational material, workshops, etc
   3. Engaging language and approach – interesting advertising approach
   4. Barrier removal – reducing barriers to change
2. Are political institutions/local governments addressed? (PRIDE CAMPAIGN)
   1. Primarily focus on smaller communities
   2. However, do involve them to some extent
3. Baseline data? Also, how do you measure results? (PRIDE CAMPAIGN)
   1. Preliminary survey conducted before each campaign
   2. Numbers in goals informed by
4. Dropoff after a long period of time? (PRIDE CAMPAIGN)
   1. Campaign over a two year time frame, then post-survey is conducted
   2. Rare is beginning to look into longer-term analysis to see whether effects are long-lasting
5. PCI reaction to report? (INNOVATION NETWORK)
   1. Primarily interested because views were very different between leadership and working groups
   2. A realization of a need for visibility in their campaign planning, and so an understanding of a need to change strategy and intended audience in goals