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Northern California Grantmakers (NCG) engaged Luminare Group to assess current practices and help establish new processes for learning and evaluation.

These processes are intended to support NCG to: collectively define what it means to be a high impact organization, and foster an organizational learning and evaluation culture.

The Evaluative Inquiry Cycle -- Framing, Focusing, Conducting, and Applying - serves as the organizing structure for this handbook in which we provide information and tools designed to support NCG in building a culture of inquiry and learning.

A learning culture is strengthened by developing an evaluative mindset, a consistent focus on the relationship of what, how, and to what end. Aligning organizational values, intention, and impact takes active collective effort and discipline. It requires ongoing interviews with formal leaders at NCG, findings from the Readiness four Organizational Learning and Evaluation (ROLE) instrument, and existing Theories of Change as well as other documents informed the structure and content.
These five questions help organizations weave together strategy, evaluation, learning, context, and impact. These questions are the heart of what the evaluative inquiry cycle seeks to inform. The answers to these questions evolve over time, so it is helpful to regularly revisit them.
FIVE GUIDING QUESTIONS

WHAT DIFFERENCE DO YOU SEEK TO MAKE?
This is not about what you do, but what happens as result of your actions. If you start the sentence describing the difference you make with a verb or any word that ends in “ing” or you mention an increase or decrease you are talking about doing rather than results.

WHAT IS YOUR UNIQUE CONTRIBUTION?
Think of this as your “sweet spot,” the thing you are uniquely positioned to do, have mastery in, and that the “market” will support.

HOW ARE YOU WORKING TO MAKE CHANGE?
This about having a clear and logical theory about how your efforts move individuals, organizations, systems, structures, or networks toward the intended changes.

WHAT ARE YOU LEARNING AND HOW CAN YOU APPLY IT?
This is about embedding educational opportunities and turning learning into organizational knowledge and action that supports your mission.

WHAT DO YOU NEED TO DO TO SUCCEED?
This is where strategy and planning intersect. Given your intention or mission and the context or environment in which you work, what capacities and competencies does your organization need to succeed? This is about things like about partnership, staffing, inter-organizational relationships and practices, and the composition of your Board of Directors.
THE EVALUATIVE INQUIRY CYCLE

The evaluative inquiry cycle provides a systematic approach for discussing and aligning values, intention, and impact. This process grounds that conversation with information.

The cycle is a mechanism for systematically gathering information to answer big picture questions. In this handbook we walk through how to apply the evaluative inquiry cycle at NCG. We have color coded sections to support navigation and use.

**PHASE 1: FRAMING**
- Clarify purpose
- Surface assumptions
- Articulate goals and objectives
- Assess organizational capacity
- Identify key questions

**PHASE 2: FOCUSING**
- Prioritize key questions
- Determine data collection methods
- Review/revise, develop data collection tools and administrative protocols
- Integrate data collection with organizational culture/program practice

**PHASE 3: CONDUCTING**
- Pilot tools/administration and modify as needed
- Collect information
- Communicate preliminary ideas about how findings will be communicated and utilized

**PHASE 4: APPLYING**
- Analyze and interpret data to:
  - Inform program development
  - Modify organizational systems and structure
  - Make decisions around future investments and strategies
  - Contribute to individual growth and educate the field
  - Inform further evaluative inquiry activities
FRAMING THE INQUIRY

THIS PHASE CENTERS ON CLARIFYING THE CONTEXT, ENVIRONMENT, AND IMPETUS FOR THE WORK.

The following questions tend to be addressed in the framing stage:

• What are the shared organizational values?
• Who are the key stakeholders?
• What is the difference you seek to make?
• What is your unique contribution?
• How are you working to make change?
• What else and who else do you need to pay attention to?

In this section, we provide guidance for what this might look like at NCG.
Part of the framing process involves explicitly naming NCG’s organizational values of Collaboration, Courageousness, Curiosity, Joyfulness, Prudence, Inclusiveness, and Integrity.

These values should flow through the relationships and activities of NCG’s work, but naming them alone isn’t enough to make that happen.

It is important to have the information and the “space” to discuss how to:
1. navigate when values are in tension with each other
2. determine how these values guide and are reflected in the work.

APPLICATION TIP
Take time during meetings and planning sessions to discuss how specific values are (or are not) connected to the work and looking for ways to collectively live the values as much as possible.
The ROLE assessment helps organizations determine their level of readiness for organizational learning and evaluation practices and processes that support it (For more information about ROLE go to: [http://bit.ly/2DJWQcq](http://bit.ly/2DJWQcq)).

NCG’s ROLE 2017 results suggest the following:

**STRENGTHS**
- Board and staff agree that evaluation is helpful
- A desire to focus on success of the whole versus individual successes
- A culture of collaboration & support

**OPPORTUNITIES**
- Create processes & systems to identify and assess the impact of NCG efforts and how well the changes are working
- Strengthen collective reflective practices
- Improve information sharing to create more clarity on what NCG has been/is trying to learn and making sure everyone is on the same page

**APPLICATION TIP**
Revisit ROLE annually either by taking the survey again or by discussing the previous results and the extent to which the strengths and opportunities for improvement are similar or what has changed. A copy of the ROLE items and NCG results can be accessed via this link: [http://bit.ly/2DJWQcq](http://bit.ly/2DJWQcq).
Another aspect of the framing process is identifying key stakeholder groups. These are the people and groups most central to and with the most at stake in the work of NCG. Central stakeholder groups are NCG staff and NCG members as well as others needed to be successful.

In reality, stakeholder groups are nuanced. For example, there are different kinds of foundations with different interests and perspectives. Determining what kinds of nuances are important to track and consider - such as foundation type, size, etc. is a useful exercise. Considering how “the most pressing issues” are identified and through what lenses they are perceived adds an additional layer of sophistication to understanding stakeholders.

APPLICATION TIP
As learning and evaluation is planned, it’s important to keep the needs and perspectives of stakeholders in mind - in some cases they hold or need critical information. Efforts that focus or depend on specific stakeholder groups should include their input and they should be engaged in sense making and use of findings. Keeping a list of stakeholder groups makes it easier to determine which groups are most relevant for particular efforts.
THINKING ABOUT LAYERS OF IMPACT CAN HELP FRAME WHERE IMPACT IS INTENDED AND CONNECT THOSE INTENTIONS TO THE WORK.
Considering what is happening within different layers and aligning efforts, when appropriate, can create strategic efficiencies. For example, if you wanted to see a certain impact in the work or the relationship between member organizations - what would need to be different in the other areas to facilitate that? What challenges might you encounter? What assets can be leveraged?

INFORMATION IS MORE CHALLENGING TO GATHER AND INTERPRET AT THE OUTER LAYERS.
The influence of NCG becomes harder to isolate when it comes to assessing community and field change. It almost never makes sense (or is feasible) to gather comprehensive data across the continuum of impact, but it is helpful to think through how the layers are (or can be) connected in order to better align efforts. The stronger the logical connections across layers, the easier it is to link available data in a meaningful way. Stories about how NCG influences community change are important and may sometimes be the best source of information, and they become more powerful when data from other layers can be logically linked to and reinforce those stories.
IMPACT AREAS ARE GUIDEPOSTS FOR THE WORK OF NCG.

The impact areas provided by NCG, and listed below, are guideposts for the work of NCG and the focus for organizational learning and evaluative efforts. Assessing impacts as the work evolves will strengthen NCG's vision for creating change as well as provide evidence of change.

LEARN.
Members connect to individual and shared purpose.

EXPLORE.
Funders find out whether together they can do more about shared issues facing the region.

DO.
Funders work with each other and with other partners to explore issues.

APPLICATION TIP
Gather member stories that demonstrate these impact statements in real terms. There is a modifiable story template at: http://bit.ly/2GtMAXF. Take time once a year to review the stories and other information to look for patterns. These Reviews will clarify how NCG's work creates impact and where adjustments are needed.
INDICATING HOW EFFORTS CREATE IMPACT WILL HELP ALIGN EFFORTS TO GENERATE IMPACT MORE EFFICIENTLY.

The primary differences that each area of focus seeks to make is listed below:

- Strong infrastructure and coordination supports equity and social justice funding as well as funding for movements
- Members adopt equity analysis in operations
- Shared analysis highlights the nature of equity, including through state and federal policy

- Grant dollars flow to equity and social justice issues in the region
- Members address needs of dislocated and displaced communities
- Members change policy for social good and the good of the sector through advocacy

- Members invest in resources on leadership and organizational culture
- Members invest in leadership and organizational culture as leverage points for personal and organizational effectiveness
- Members are at the top of their game in the art and science of philanthropy, in order to effect positive social change

SOURCE: Revised Impact Statements from NCG December 2017
AN EVALUATION AND LEARNING CULTURE BALANCES BEING EXPLICIT WITH NURTURING EMERGENCE, URGENCY AND THE UNINTENDED.

Evaluative culture embraces being transparent about intentions and scrutinizes assumptions, capacity, values and feasibility. This is done to link effort to impact as much as possible, recognizing that in some cases it is a leap of faith that can be explored further using data - but it is important to identify the need for more information or the effort will remain a leap of faith.

APPLICATION TIP
Use large sticky notes with one color for impact and another color for effort (or the work being done) and another color for notes, insights, or questions. That allows you to move things around and add to or change stickies as things get clearer. When examining the work, ask yourself why and to what end are we doing these things? When examining impact ask yourself what are we doing to make or to help that to happen? Use the third color of sticky notes to track assumptions or questions you have as well as ideas for what kind of information would be helpful to have.

It would be time consuming and overwhelming to do everything at once, so we recommend focusing on one area at a time. Start with the organizational impact statements and then work through each area of focus separately. It can be helpful to do this work on poster boards or large sheets of paper that can be referred to and refined often.
Thinking about evaluative inquiry as storytelling can change how we conceptualize and use data.

QUESTIONS TO ASK YOURSELVES AS YOU MOVE FROM FRAMING TO FOCUSING:

- What are the most important differences NCG seeks to make?
- Who is part of the story of your work and your impact?
- What is the role of NCG’s work in creating that difference?
- What information is most compelling and convincing (and for what stakeholder group) when it comes to illustrating the difference NCG makes?
FOCUSING THE INQUIRY

THIS PHASE CENTERS ON IDENTIFYING THE MOST IMPORTANT QUESTIONS TO ASK (GIVEN FRAMING) AND THE INFORMATION NECESSARY TO ANSWER THEM.

The following questions tend to be addressed in the focusing stage:

• What do we need to know and why?
• How can we know?
• Who will use the information? How will the information be used?

In this section, we provide guidance for how NCG can focus inquiry efforts.
FOCUSING THE INQUIRY

INQUIRY CAN FOCUS ON DIFFERENT ASPECTS OF THE WORK AND BE GROUPED INTO DIFFERENT TYPES OF QUESTIONS.

Understanding the type of question being asked helps you understand what kind of information will best answer that question. On the subsequent pages we provide guidance about how NCG can use these types of questions in practice. We recommend doing this for the organization overall as well as for each area of focus.

HOW MANY?
What was the focus and nature of activities for members and others? Was it the balance of work we intended? Does the type and balance of work make sense in terms of the impact we want to have? Who did we reach? Was it who we intended? Who did we miss?

HOW WELL?
How well does our work align with our mission and values? How well were efforts implemented? By whose standard? What are we learning about how to do this work well?

WHAT CHANGED?
What changed for members (knowledge, skills, attitudes, behavior)? What changed at their organizations? What is different in the community (or the region)? Was it as we intended?

DID IT MATTER?
What difference did the change make for individuals, organizations and the community? What value was created?

WAS IT WORTH IT?
Are we using our time and other resources to achieve our mission effectively? It is the highest and best use of all our resources?
FOCUSING THE INQUIRY

HOW MANY?

INFORMATION ABOUT THE TYPE OF AND AMOUNT OF EFFORT IS CALLED “MONITORING DATA.” MONITORING DATA ANSWERS QUESTIONS THAT FALL INTO THE “HOW MANY” CATEGORY.

Most organizations gather some level of this kind of data. At NCG, data that falls into the “How many” category would include things like the number of and types of members, programs, events, or campaigns as well as how many members have participated in programs or events offered, and how many people downloaded content from the NCG website or clicked through to content.

THIS INFORMATION IS IMPORTANT BECAUSE IT PROVIDES A SENSE OF SCOPE AND TYPE OF WORK BEING DONE.

However, monitoring data does not provide insight into the resulting changes or value created. Tracking resources and efforts is important when determining impact because it informs what can be realistically expected in terms of the type and amount of impact. If there is a significant level of effort going to areas of impact that are not mission critical, resources could probably be better allocated. That information may also reveal areas of impact that are important but have not been explicitly indicated. For NCG, understanding trends in membership can reveal stakeholder groups that are engaging more (or less) and prompt questions about why that might be.

THE NEXT STEP FOR NCG IS FIGURING OUT WHAT MONITORING DATA IS MOST IMPORTANT TO TRACK, FOR WHOM, AND HOW TO BEST TRACK THEM.

• What data do we need to gather to describe members?
• What data do we need to gather to describe our efforts?
• To what extent are the data we currently gather useful to us?

Possible Information Sources: CRM data, program documentation (such as registrations, what content was the focus of the program, the types of programs offered), etc.
FOCUSING THE INQUIRY

INQUIRY FOCUSED ON “HOW WELL” IS FEEDBACK THAT PROVIDES INFORMATION ABOUT THE QUALITY OF EFFORTS.

“How well” questions should align with the intentions stated in the Framing phase (what change was desired). The clearer the framing, the easier it is to focus.

Many organizations gather some kind of feedback data, but often, those efforts stop at general satisfaction surveys, which typically do not provide actionable information about how well efforts are doing in specific areas.

At NCG, information about "how well" could include things like gathering feedback after programs or events from participants or information about how well NCG is identifying and responding to member needs.

APPLICATION TIP
Regularly review data collection practices. Make strategic tweaks to get and use information strategically. For example, add items to the membership renewal form to gather more input from members on their needs. Another approach could be using communication analytics to inform discussions about member interests. This data can be connected to information about how well NCG is performing in these areas.
FOCUSING THE INQUIRY

Below is a list of questions to consider. As a team, discuss areas where it is important for you to know how well you are doing, go deeper to identify what are the most important questions, for what stakeholder groups, and how you will use the answers. The questions should speak to both NCG as a whole as well as specific endeavors. For example, if you are trying out a new programmatic approach - there are assumptions you will want to check by gathering stakeholder input - such as “to what extent was this process engaging?” and “what was the most valuable thing you got out of this program? What difference will that make in your work?”

THE MOST IMPORTANT THING IS THAT THE QUESTIONS AND DISCUSSIONS ARE STRATEGICALLY ADDRESSING KEY AREAS OF INQUIRY AND THE ANSWERS OR THEMES ARE DOCUMENTED SYSTEMATICALLY.

While surveys can be an efficient way to gather this information, making a few informal phone calls or setting aside time to debrief also yields valuable information. General questions to consider include:

• How well (and in what ways) does our work reflect our values?
• What are our members’ interests? Are there subgroups we need to better understand/attend to?
• What kind of interactions do members want with NCG? With other members? How well are we meeting that need?
• What approaches are most effective in engaging & supporting members?
• What do members depend on us most for? How well are we addressing that need?
• Who else do we need to engage and what else do we need to do to have greater impact?

Possible Sources: staff conversations, membership renewal forms, advisory group input, communication analytics, surveys, informal conversations with stakeholders
FOCUSING THE INQUIRY

HOW WELL? WHAT CHANGED?

FEEDBACK ON SPECIFIC EFFORTS CAN BE USED TO INFORM DESIGN OF FUTURE EFFORTS AND AS A WAY TO TRACK HOW THE IMMEDIATE RESPONSE LINKS WITH (OR LEADS TO) INTENDED IMPACT.

Below are general types of questions. The specific questions asked on a survey, or through other means, would be customized for the type of effort. Typically, you would want to gather this information soon after the program or event (potentially at the end of the event itself). The individuals most able to answer these questions are often the participants as well as the program faculty/staff. If the feedback is about the resulting changes, then you need to wait long enough to be reasonably sure those changes would have happened which will depend on the change and the context. Think about who is in a position to see the change. Where appropriate extend the inquiry beyond just participants. Maintain records for important efforts so you build a “trail of evidence” or a “story of change” over time. Feedback areas:

QUALITY/CLARITY. Is the information easy to understand?

RELEVANCE. Is the focus of the information appropriate, interesting and in support of the purpose of the effort?

VALUE. Is the information provided helpful/useful?

KNOWLEDGE GAINED. Is new knowledge gained or a new/broader perspective achieved as a result of the information presented? Was it as intended?

RELATIONSHIP. Was a strategic relationship formed or deepened?

Possible Information Sources: program & event surveys, information conversations, interviews, advisory focus groups
FOCUSING THE INQUIRY

DID IT MATTER?

Developing questions and data collection systems to understand and connect impact statements to the work done is the heart of evaluation, and it can be arduous to do well.

The good news is that it doesn’t all need to be done at once. There is value in having a discussion about what impact would look like and how you would know will inform how the work can be shaped to yield that outcome, even if there aren’t the resources to conduct a full scale evaluation.

Brainstorming and discussing potential questions and thinking through what approaches would be most valuable and make the most sense can help identify possibilities that are practical as well as lay the groundwork for future efforts.

APPLICATION TIP
Carve out time to reflect on and discuss high level questions of impact like:

- As a result of NCG efforts how many funders are adopting equity analysis in their work and what difference is that making in the community?
- To what extent are funders better addressing the needs of dislocated and displaced communities as a result of NCG’s efforts?
- For each high level question ask - What information do we have? What information do we need? What information can we reasonably get?
FOCUSING THE INQUIRY

DID IT MATTER?

To date, NCG has focused on describing the work, getting feedback, and understanding the immediate outcomes - all of that is important, but none of that answers the key questions about what difference NCG makes and why it matters.

APPLICATION TIP

A low resource approach is gathering stories by interviewing members about how they are applying ideas, approaches and relationships fostered by NCG and to what difference that is making for them.

Over time and through staff discussions about themes and patterns – specific examples of impact may become clear enough to measure in more systematic ways.
FOCUSING THE INQUIRY

DID IT MATTER?

AN INQUIRY MATRIX IDENTIFIES AND ORGANIZES KEY QUESTIONS ASSOCIATED WITH THE INTENTIONS AND IMPACTS IDENTIFIED IN THE FOCUSING STAGE.

An Inquiry Matrix can be used to map the high level questions associated with the strategies (or type of efforts) used to achieve different types of impact. A modifiable Inquiry Matrix Template can be found at: http://bit.ly/2GtMAXF. In this case we have used the organizational impact statements, we recommend that this also be done for the areas of focus. The strategies would need to be added and should clearly connect to the intended impacts.

While it may look like a daunting task, the process can be as simple as:
1. print, draw, or project the High Level Inquiry Matrix template
2. post it on the wall
3. have a conversation to determine the key questions.

Use the generic questions listed on the far left as prompts for more specific questions that map to the larger questions. Make your assumptions about how to create impact explicit so you can gather information to test those assumptions. Write down all the questions that the group identifies determine what stakeholders have information to help answer the questions.
## INQUIRY FOCUS

Critical QUESTIONS to learn about strategies/values/interim outcomes

| 1  | To what extent has NCG fostered connections among staff, board, members, partners, and decision & policy makers to address critical issues facing our region? |
| 2  | To what extent do NCG members feel connected to a stronger individual and shared purpose? |
| 3  | To what extent do funders feel informed about the critical issues facing our region? |
| 4  | To what extent and in what ways do those engaging with the NCG experience our values? |
| 5  | To what extent are critical conversations about advocacy and policy change happening? To what effect? What has been NCG’s role in these conversations? |
FOCUSING THE INQUIRY

As part of our work in OCTOBER 2017, NCG identified the following AREAS OF INQUIRY which are also included in the template:

What role can philanthropy play in advancing meaningful community-oriented systems and policy change beyond funding?
• What makes our members tick? What do they want from us? What do they respond to? What aspects of our three areas of focus are of interest to our members? What will move funders from research to action?
• What is NCG’s desired impact?
• Given the opportunities before us, which are most likely to result in real progress/impact for the sector and community?
• How do we best frame issues and areas and how do we know if we are making progress in the 3 areas of focus?
• How do we reframe issues to get people out of silos?
• How do we truly engage our members?
• How can we catalyze multi-sector investment/movement? How do we establish the gravitas and connections to convene multi-sector groups?
• How do we break into the tech/start-up sector and have them see NCG as a valued partner?
• What is the most effective program design for members to become better grantmakers?
• How do we increase attendance/reduce the attrition of our programs?
• Why have things been recorded/tracked in a certain way in our databases?
• What is the best way to communicate?
FOCUSING THE INQUIRY

AT THE END OF THE PROCESS FOR IDENTIFYING QUESTIONS, THERE WILL PROBABLY BE MORE QUESTIONS THAN YOU CAN PURSUE, SO YOU WILL WANT TO PRIORITIZE THESE QUESTIONS.

The matrix below can be used to map questions based on the importance relative to the resources needed to answer it. This matrix is general but it can help frame the prioritization process. Keep in mind that a consensus approach may not be the best choice. A question that is particularly valuable to a person or group who has the resources to answer that question might be pursued, even if others are not particularly interested in it. On the flip side, a question of interest to one person/program may not warrant pursuing if it takes resources away from questions of interest to NCG as a whole.

<table>
<thead>
<tr>
<th>How important, crucial, or valuable is it to answer this question?</th>
<th>How difficult, expensive, or impractical is it to answer this question?</th>
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<tr>
<td>High</td>
<td>Determine if there is a way to get the needed resources or if there are alternative ways to pursue/frame these questions that are more feasible</td>
</tr>
<tr>
<td>Low</td>
<td>Make sure pursuing these questions doesn’t divert/waste resources</td>
</tr>
<tr>
<td>Low</td>
<td>Consider not pursuing these questions</td>
</tr>
<tr>
<td>High</td>
<td></td>
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CONDUCTING THE INQUIRY

THIS PHASE CENTERS ON DECIDING HOW AND WHERE THE INFORMATION WILL BE OBTAINED.

The following questions tend to be addressed in the conducting stage:

- How will we collect the information?
- Who will collect the information?
- When will we collect the information?
- Where will we find it?

In this section, we provide guidance for what this might look like at NCG.
ONCE YOU HAVE DECIDED WHAT QUESTIONS TO PURSUE, CONDUCTING IS ABOUT THINKING THROUGH AND PLANNING THE STEPS TO GATHER, MAKE SENSE OF, AND USE INFORMATION.

During the conducting stage you operationalize the inquiry matrix by creating a Data Collection Matrix. For a modifiable Data Collection Matrix see http://bit.ly/2GtMAXF. For each area of inquiry you want to pursue - ask the following questions:

1. What are the best ways to gather information to answer this question?
2. When do we need the information?
3. When/where are the best times to gather it?
4. Do we have the right resources to gather and make sense of the data?
5. Who will use the information?
6. Who should be involved in making sense of the information? Should we get their input before we gather information?
7. Are there other ways to leverage the information for greater use? Does that change how/when/who we ask?
CONDUCTING THE INQUIRY

The sample Inquiry Matrix includes actual and potential data sources that can provide answers to priority questions.

We included data collection approaches and sources based on what we understand of current NCG practices as column headers. The questions need to be refined based on your Focusing work.

These questions are the higher order or bigger strategic questions that help you understand progress towards impact, what you do well, etc. They are not the ones you might include on surveys or as part of debrief.
CONDUCTING THE INQUIRY

Evaluation tells stories with words and with numbers. As you consider different data collection options, think about what kind of data will be most useful.

QUANTITATIVE APPROACHES can provide broader ‘big picture’ data quickly and can help identify themes to further explore and who to engage in sense-making.

QUALITATIVE DATA are typically more evocative and relatable. Often these stories are remembered more than the numbers.

APPLICATION TIP
Systematically collecting both qualitative and quantitative data can help you tell a compelling story. Comprehensive data collection will also help you determine if you are making progress towards the difference you seek to make.
Listed below are sample survey items to consider using across events and platforms. The idea is to focus on a core number of questions that span various events and audiences. These items will provide useful information about a given event, the perspectives of a particular stakeholder group, and more importantly the collective perspectives and experiences. Using consistent items allows you to combine and compare information across efforts. Not every item will be appropriate for everything and you will likely want to create custom items for specific efforts - but where appropriate using the same items can yield deeper insights and is more efficient.

For higher response rates, keep surveys simple and focused. At in-person events have participants complete surveys at the end of event whenever possible -- include time for this in the agenda and hold to this agenda space to reflect the value of their input.

- To what extent was the material/information easy to understand?
- What, if anything was not clear?
- To what extent was the focus of the program/event relevant to you and your work?
- To what extent was the information provided helpful/useful?
- What did you learn about or understand better as a result of the information presented?
- To what extent did you form or deepen a strategic relationship?
- How do you intend to apply or use what you learned?
- To what extent do you better understand your (or your organization's) role in advocacy and policy change?
- To what extent do you feel better informed about critical issues facing this region?
- To what extent do you have a broader, more complete perspective on critical issues facing this region?
- To what extent do you better understand the different stakeholder roles related to the critical issues facing this region?
Modify and use a story template to capture stories from Members, Partners, Staff and Board about the importance and impact of NCG’s work. There is a modifiable story template at: http://bit.ly/2GtMAXF.

Information needed to understand the importance and impact of NCG’s work will emerge in moments and in ways that cannot be adequately addressed in surveys. To this end, a form for capturing stories is provided.

The format can capture stories as they emerge and are shared. It can also serve as a repository for the collective story of what this process looked like and what was learned as it unfolded. This will help you identify and acknowledge progress and apply learning.
APPLYING THE LEARNING

THIS PHASE CENTERS ON MAKING SENSE OF AND USING THE INFORMATION.

The following questions tend to be addressed in this stage:

- What does it mean?
- Who should be part of this process?
- What should we do?

In this section, we provide guidance for what this might look like at NCG.
MAKING SENSE OF DATA IS THE FIRST STEP TO USING IT.

For complex or puzzling data, additional perspectives may be needed. It is also helpful to keep in mind that the same data can tell different stories depending on who you ask.

Engaging stakeholders in sense-making yields benefits such as deepening the relationship, understanding issues from different perspectives, and identifying ways to use information more strategically. While this can be in the form of a data retreat, incorporating data sharing and opportunities for interpretation into regularly scheduled meetings is the surest way of supporting a culture of evaluative thinking.

Regularly assessing the helpfulness of your data, as well as its use, is an important way to make sure that you make the best use of time.
APPLYING THE LEARNING

INTERPRETATIONS AND IMPLICATIONS

Below are high level questions to consider as part of data interpretation processes.

1. WHAT?
   • What do we know or suspect based on the information? And who is the we?
   • Whose perspectives don’t we have that we might need? Are we missing vital perspectives?

2. SO WHAT?
   • What should we celebrate?
   • What, if anything, should we change? In what ways?

3. NOW WHAT?
   • Are there other ways to leverage the information for greater use?
   • Who else should know this?
   • Do we still need to collect this information?
   • Is there other information we need? Do we need other information?
WAYS TO USE INFORMATION

Engage stakeholders by sharing data and discussing it with them. For example, you may want to share data about membership with an advisory group to get their perspective on what the data mean and what NCG may want to do about it.

Focus on one key inquiry question as a component of a regular staff meeting and make sense of the available data as a team and consider what if anything needs to be done differently or if there is additional information that would be helpful to have.

Celebrate the good/success stories coming out of the data. All too often we focus on the troubling areas, which can make evaluative processes disheartening.

Where appropriate, use data about impact (including stories of impact) on the NCG website and as part of annual reporting to focus on the value of what NCG does, not just descriptions of what NCG does.
APPLICATION TIP

Use a Sense Making Meeting to make sense of and use data as a group. For a modifiable Sense Making Meeting Agenda Template see [http://bit.ly/2GtMAXF](http://bit.ly/2GtMAXF). The group gathered will depend on the type of and purpose of the data reviewed. Edit the agenda based on your needs.

Meeting Prep: Provide summary of findings for review prior to meeting - something that can be reviewed in 30 minutes or less. Ask people to review and note the top 2-3 findings that stand out, because they resonate, are surprising, or suggest a change.

<table>
<thead>
<tr>
<th>Stage</th>
<th>Purpose</th>
<th>Outcome</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gather &amp; Set the Stage 10 min</td>
<td>To provide an overview of the session and the intended outcomes.</td>
<td>Expectations for session set.</td>
</tr>
<tr>
<td>WHAT 15-20 min</td>
<td>To allow everyone an opportunity to share, including those who don’t share in large groups.</td>
<td>Everyone participates and themes emerge for important findings</td>
</tr>
<tr>
<td>SO WHAT 15 min</td>
<td>To build from strengths</td>
<td>Potential areas for improvement are considered in the context of what is working.</td>
</tr>
<tr>
<td>NOW WHAT 10 min</td>
<td>Build momentum to apply learning</td>
<td>Next steps, timeline and roles reviewed.</td>
</tr>
</tbody>
</table>
APPLYING THE LEARNING

APPLICATION TIP
Schedule time to reflect on a specific practice or effort as a group. For a modifiable Reflection Meeting Agenda Template see: http://bit.ly/2GtMAXF. This type of activity can be woven into regularly scheduled retreats or meetings. The purpose of this approach is to create the space for reflection and discussions based on priorities and intentions.

OPPORTUNITY FILTER QUESTIONS

Values
How did this work align with NCG’s values?

Goals
How did this work advance NCG’s annual goals?

Strategy
How did the impact of this work advance NCG’s strategy?

Impact/Gap
In what ways did NCG’s involvement have an impact or fill a gap?

Support
How much and what kind of support was present from members? To what extent did this effort seed or lead to future support?

Partnership
How did this work influence partners engagement?

Goodwill
How did this work build goodwill? With whom?

Consequences
Were negative consequences of the engagement? What were they? Unintended benefits?

Capacity/Timeframe
What resources were required? Was it worth it?

Funding
Was there sufficient funding to support the effort?
IN THIS SECTION WE HIGHLIGHT KEY, HIGH LEVEL, RECOMMENDATIONS AND SUGGEST NEXT STEPS FOR NCG.
RECOMMENDATIONS
& NEXT STEPS

RECOMMENDATION 1.
EXPAND INQUIRY STRATEGY FROM “HOW MUCH” TO
“WHAT’S CHANGED” AND “TO WHAT END.”

☐ Revisit the “big picture” questions as a management
team regularly (at least annually).

☐ Based on the available data, clarify the intended impact
statements. Specify who & what is involved in creating
impact.

☐ Engage all staff in strategic discussions in order to
learn together, surface assumptions, and focus and align
efforts. Rethink why people come together.

☐ Structure program updates to focus on information
relevant to NCG processes and impact areas.

☐ Utilize staff time to collectively make sense of findings,
determine next steps, and clarify areas of inquiry.

☐ Where appropriate, engage the Board (at a high level)
in conversations about impact.
RECOMMENDATION 2. STREAMLINE DATA COLLECTION AND USE EFFORTS.

- **Identify what information is most needed, who needs the data, and how it informs decisions or actions.** Consider how information will be used before you start to collect it. Is there someone with the time & the skills to make sense of it and use it?

- **If data isn’t being used or isn’t very helpful, ask why not?** If data isn’t helpful or needed stop gathering it. If the data should be used, but the way in which or the timing of when it is gathered prevents or diminishes use, then revisit how or when the data is gathered.

- **Integrate targeted data collection into existing processes in order to avoid overburden.**

- **Build inquiry and sense making activities into the regular and existing ways in which you come together.**
RECOMMENDATION 3.
UPDATE INQUIRY AND DATA COLLECTION MATRICES.

- **Finalize and prioritize key questions** to use in the inquiry matrix.
- **Update the data collection matrix** to reflect the final inquiry questions.
- **Review the data collection strategies** to be sure they are feasible and effective approaches supported by current capacity.
- **Use the provided meeting templates** to inform discussions about data, its meaning, and its use.
RECOMMENDATIONS & NEXT STEPS

RECOMMENDATION 4.
SCHEDULE A REFLECTION AND LEARNING SESSION.

In 4-5 months step back and ask the following questions of your evaluative practices:

- What’s working well?
- What’s challenging?
- To which EI Phase do our most pressing challenges relate? Framing, Focusing, Conducting, or Applying? What does this suggest about what is needed to address this challenge?
- How can we leverage what’s working in other EI Phases to mitigate challenges?