Impact, Data and Evaluation Academy (IDEA) Group Level Assessment Report Executive Summary

Introduction

On May 31, 2024, The UNC Charlotte Urban Institute (UI) hosted a four-hour Group Level Assessment event to inform the curriculum design and development of a proposed new nonprofit certificate program in data management and evaluation. Group Level Assessment (GLA) is a large-group participatory process designed to generate, evaluate, and prioritize needs-based qualitative data in real-time among a diverse group of stakeholders.

The proposed certificate program—Impact, Data, and Evaluation Academy (IDEA)—is being developed in response to an identified need among small, grassroots nonprofit organizations (NPOs) for data collection, data management, and evaluation training and support. The curriculum development process was designed to center the perspectives and needs of small nonprofits. NPO leaders were engaged in every phase of the design process with the intent of democratizing access to data and the power of informed decision-making that data management and evaluation enable.

The GLA planning process was driven by the following goals and research questions.

Goals:
1. Identify the needs, interests, learning practices, and learning modality preferences of the target audience for the IDEA program.

2. Provide GLA participants opportunities for networking, sharing ideas, and building community.

3. Build buy-in from funders and others for the development of IDEA.

Research questions:
1. What assets (e.g., knowledge, experience, awareness, partnerships, time, motivation, systems) do small and grassroots NPOs bring that enable effective program monitoring, evaluation, and data management?

2. What are the barriers—internal (e.g. knowledge, experience, awareness, time, motivation, data systems) and external (e.g. cost, physical access, classes, and accessible learning opportunities)—to effective data management and effective program evaluation and monitoring?

3. What should be the critical design elements for IDEA that reflect the realities of nonprofit leaders' lives at work and home?

The GLA was attended by 48 racially- and gender-diverse participants, including 22 small, grassroots nonprofits; 10 medium-to-large nonprofits[1]; 13 content experts (six of whom also served as table facilitators); and three funders. The goal of prioritizing the input of nonprofit organizations was achieved by creating a 2:1 ratio of nonprofits to other content generators.

To enable the analysis of data gathered during the GLA by participant groups, participants' name tags and Post-it notes used to record participants' responses to 22 prompts were color-coded by respondent category (i.e., small nonprofit, large nonprofit, content expert/consultant, and funder). This enabled the professional curriculum developer to customize content and delivery based on the expressed needs of small versus medium-to-large nonprofit leaders.

A brief summary of the findings is below. To access the full technical report, email bridget.anderson@charlotte.edu.

GLA Findings

GLA participants generated over 1,100 individual responses to 22 wall-mounted prompts. Four rounds of thematic response groupings led to the findings.

The research questions and their corresponding findings are described below.

Research Question 1: What assets do small and grassroots NPOs bring that enable effective program monitoring, evaluation, and data management?

- **Empathy and equity-focus are strengths.** In almost equal measure, small and large nonprofit leaders report that the ability of small, grassroots nonprofits to serve clients with empathy and through an equity perspective is a strength. This includes centering clients and the community in the work, meeting clients where they are, and designing interventions around identified needs rather than being prescriptive and inflexible.

- **Nonprofits appreciate the value and potential of their data.** Nonprofit leaders' responses about current uses of data demonstrated a basic understanding of and appreciation for the inherent value of data collection, even if they do not yet possess the tools to do it. This foundational openness and readiness to collect and utilize data is viewed as an asset.

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[1] For the purpose of GLA participant recruitment, "small" nonprofits were defined as those with budgets under $500,000 and three or fewer paid staff. The distinction was made between small and medium-to-large NPOs in order to disaggregate and analyze responses to the prompts by size of organization.

- **Informal peer networks are a critical asset.** Nonprofit leaders cited networks of peers and trusted individuals as external assets to whom they go for advice and support with data management and evaluation.

Research Question 2: What are the barriers—internal and external—to effective data management and effective program evaluation and monitoring?

- **There are insufficient resources, tools, and internal capacity.** Among the internal barriers identified by nonprofit leaders, the lack of funding, resources, and tools to enable data collection and evaluation were the most frequently mentioned by all nonprofit leaders, and echoed by content experts. Specifically, leaders referenced the lack of internal capacity including staff, in-house expertise, training and development, and budgetary allocation to support data management and evaluation.

- **The absence of an "evaluation culture" within nonprofits is a limiting factor.** An additional identified internal barrier is the absence of an "evaluation culture" within nonprofit organizations; that is, a prevailing mindset and organizational value that data collection and evaluation are important components of delivering effective programming – not just another administrative duty.

- **More trusting relationships are needed between nonprofits and funders and consultants.** The external barrier most frequently cited by nonprofit leaders was the absence of a collaborative, trusting relationship with funders and consultants. Specific references were made to the lack of openness and receptivity among funders and consultants to thinking about outcomes and impact in new and different ways, and challenges with outcomes not measuring the qualitative and quality of life changes some nonprofit clients' experience. Nonprofit leaders reported a fundamental disconnect between themselves, content experts, and funders around goals, expectations, communication, and what is valued. Content experts' responses indicated that they share this perspective.

- **Nonprofits and funders need to be more closely aligned in values about evaluation.** A thematic throughline running throughout the prompt responses about barriers spoke to a fundamental values misalignment between nonprofits and funders **(Table 1).** Specific examples included perceptions that funders prefer metrics that do not capture qualitative client outcomes and impact, and that funders value return on investment (ROI) over human-centered factors.

Table 1. Misalignments between nonprofits and funders are barriers to effective data management and evaluation.

Misalignment	Nonprofit Quotes	Content Expert Quotes	Funder Quotes
Misalignment 1: **Financial restrictions and focus on numbers and dollars over people**	"Funders only focus on hard numbers and not other measures (e.g., belonging, empowerment)." "[The] relationship remains transactional."	"Funders refuse to fund operational costs. Funders ask for data that does not align with how nonprofits collect data."	"Funders micromanage or only fund for 1 year"
Misalignment 2: **Values and priorities**	"Funders impose goals that are not aligned with the organization's mission."	"NPOs and funders have different kinds of expertise but assume different means none." "There is no trust."	"[There are] too many expectations and lack of flexibility"
Misalignment 3: **Reporting**	"Reporting [is] too heavy that it takes time away from the real work."	"Reporting requirements are too much & don't really make sense for the NPO."	

Note: Quotes are a response to Prompt 15: "In my experience, the relationship between funders and nonprofits struggles when…."

Research Question 3: What should be the critical design elements for IDEA that reflect the realities of nonprofit leaders' lives at work and home?

Responses to the prompts associated with this research question fell into four thematic categories:

- **Format and cost of the program must meet the needs of NPOs.** While affordability of the IDEA program was the most frequently mentioned requirement cited by nonprofit leaders, several other design and delivery attributes are important to nonprofit leaders such as virtual, on-demand, and self-paced options.

- **The curriculum content must reflect the continuum of need of NPOs.** All GLA participants stressed the importance of meeting nonprofits where they are, in terms of the scope and complexity of the curriculum content. There exists a continuum of educational needs and capacity among nonprofits that will need to be accommodated.

- **Simplify supporting technology for data collection and analysis.** Nonprofit and content expert GLA participants would like to ensure that ongoing data collection and evaluation can be performed using tools and software platforms that are affordable and already available rather than expensive add-ons to their current software systems.

- **Continue to be mindful of existing trust and values misalignment issues.** As previously mentioned, the perceived lack of trust and misalignment of values between nonprofits, funders, and content experts were recurring themes across responses to prompts under two of the three research questions **(Table 1).** As the development of the IDEA curriculum proceeds, it will be important to be mindful of cautionary advice offered by GLA nonprofit participants to ensure that design and implementation reflect consideration of these issues.