



EVALUATE



Evaluation will help you:

- **Learn** whether your activities are producing the desired results or change you are seeking to accomplish;
- **Gain** new insights into how you can improve your programs and increase your impact;
- **Demonstrate** to funders and donors that your work is making a difference;
- **Give** you data that can serve as a foundation for your next strategic plan.

(There is a great deal to learn about Evaluation, and many nonprofits find it daunting. Until another Toolkit focused on this topic is developed, this section touches on a few key points – particularly how evaluation relates to your Strategic Plan.)



Strategic Planners know at the EVALUATE stage that:

1. **Evaluation is really just a plan to track your progress.** It can be complicated and expensive, but every nonprofit can engage in simple evaluation activities. Seeking feedback from clients periodically and tracking a few key data points related to outputs and outcomes are common first steps.
2. **As community stewards, the Board has responsibility to ensure that the organization is making a difference.** Evaluation is the pathway to determine what results you are achieving. It can help you reflect on your successes and avoid repeating your failures. As board members, you want to hold the organization accountable to achieve results on behalf of the community.
3. **Your Strategic Plan can be your first evaluation project.** The board can monitor progress toward plan outcomes. A simple monitoring plan can be outlined in the plan itself. Some boards set up a dashboard to track key data points.
4. **Measuring your work and finding indicators to track progress will help you tell your story to current and potential supporters.** In today's competitive funding environment, it is valuable to have data that supports your program strategy. You may also want to articulate your "theory of change" or develop a logic model to help you explain your approach to others inside and outside the organization.



Strategic Planners can show that they know these elements in the following ways:

- A. They put a plan in place to periodically monitor progress against the plan.
- B. They set measurable objectives and periodically review whether they have been met.
- C. They attach success indicators to each strategic priority of their plan. They create a dashboard report to track performance.
- D. They use formal data collection and analysis methods to assess program impact.



Strategic Planners produce these documents at the EVALUATE stage of planning:

- Evaluation Plan with key indicators and milestones aligned with the plan
- Dashboard for reporting to the Board of Directors

There are a few key **tools** that might help you produce these documents:

- Dashboard Sample
- Sample Monitoring Plan



These ideas have worked for other Strategic Planners:

- Develop a logic model or theory of change
- Try to find ways to represent your data visually using charts, graphs or infographics
- Engage an outside evaluation expert to help you create a meaningful evaluation plan and data collection tools.

Congratulations!

**You've completed The Strategic Planning Cycle,
and you're ready to embark on a new phase
of your organization's journey.**

**You are on your way.
But don't forget – as always – to SPIN AGAIN....**

