"Dancing with data": Investing in capacity building for non-government organisations (NGOs)

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Developing evaluation capacity with non-government organisations (NGOs) in New Zealand is in vogue, with funders increasingly keen to demonstrate that their investments in social-service programmes are outcomes-focused and providers keen to demonstrate the difference they are making. This article presents a case study of how a large philanthropic trust, focused on family social health and wellbeing, engaged with their grant recipients to improve both outcome-focused evaluation practices and their own evaluation of grants. Partnering with a community funding broker and a research company, the Trust enabled an evaluation capacity-building programme, Dancing with Data. This programme was conducted as three distinct workshops several months apart, with 34 grant recipients ranging from small to large NGOs. Through this initiative, these agencies have developed an evaluation framework focused on the value and cumulative impact of funded projects. An evaluation of this programme with participants and key stakeholders highlighted the challenges and benefits of such a collaborative approach to developing the skills and knowledge needed to commission or undertake effective outcome-focused evaluations.

Introduction

The context in which non-government organisations (NGOs) deliver service outcomes has increasingly come under scrutiny from both government and non-government funders, including philanthropic organisations (Lennie, Tacchi, & Wilmore, 2015; Wandersman, 2014). Funders require NGOs to demonstrate an increased level of professionalism and accountability for delivering high-quality service and contracted outcomes. At the same time, funders increasingly realise that evaluation capacity within NGOs is lacking, and that this is an essential missing component of sustainable evaluation practice (Blewden, 2015; Leviton, 2014; Preskill & Boyle, 2008). As a consequence, a range of capacity-building initiatives have been formulated to support NGO organisational development (Minzner, Klerman, Markovitz, & Fink, 2014). Capacity building has been defined as an empowering activity that strengthens the ability of an organisation to achieve its service objectives (Cayley, 2006). This transition has required many NGOs to increasingly think of themselves as businesses, which is often very different to align with their traditional social-service and sometimes faith-based perspectives (Eade, 2007; Paton, 2006).

Since the late 1990s, federal and state departments in the United States have invested funds into programmes to build the capacity of NGO service partners, and potential partners, to ensure the provision of quality and value-for-money social services (Minzner et al., 2014). Similar government-funded capacity building initiatives have also been developed in many other developed countries including the United Kingdom, Australia, Canada, and New Zealand (Cayley, 2006; Mitchell, 2014; Paton, 2006). Capacity building can target a wide range of areas such as fundraising, use of technology and media, research and policy development, financial planning and

management, or general skill improvement (Paton, 2006). In recent years an emerging aspect of NGO capacity building is the establishment of organisational skills to undertake evaluative research. This development has, in part, been driven by increasing demands on NGOs to provide evidence detailing the impact of their service work (Rotondo, 2012; Huffman, Thomas & Lawrenz, 2008). This demand is driven by changes to global development agendas, ruling political parties, policy directions and budget decisions, and the subsequent impact thereof on funding and funding priorities (Patton, 2006).

In this context an innovative partnership developed between a large philanthropic trust based in Auckland (SKYCITY Community Trust) (the Trust), their grant recipients (34 NGO social service providers in the greater Auckland area and Northland), and Auckland Communities Foundation (ACF). ACF is an independent, regional, not-for–profit foundation whose central role is to encourage philanthropic giving in Auckland and Northland. It provides specialist fund management and grant-making expertise to corporate and private donors wanting to contribute to the city's social and cultural development. They commissioned Impact Research NZ (IRNZ), a research company based in Auckland, to develop and deliver an evaluation capacity building programme for the Trust grant recipients. This programme, called Dancing with Data, was delivered as three workshops over several months. This article presents the partnership as a case study to demonstrate how the NGO service providers were mentored to improve their outcome-focused evaluation practices and how SKYCITY used this initiative to enhance their capacity for grant-making. The challenges and benefits of a collaborative approach to evaluation capacity building are explored before the programme is outlined.

Evaluation capacity development

For the past decade, developing evaluation capacity has been attracting the interest of researchers committed to advancing an evaluation culture and research practice in organisations (Cousins, Goh, Elliott, & Bourgeois, 2014; Labin, Duffy, Meyers, Wandersman, & Lesesne, 2012, Wandersman, 2014). Evaluation capacity building has been defined as an intentional process to increase individual staff knowledge, motivation, and skills of evaluation; and to create and sustain an organisational culture that promotes quality evaluation as a part of an organisational structure (Baizerman & Compton, 2007). Evaluation capacity has been found to be higher, in terms of capacity to do and capacity to use, in organisations that have developed systematic mechanisms to institute an evaluation culture within their walls (Bourgeois & Cousins, 2013).

Ideally, an organisation builds evaluation capacity both to undertake evaluation for external accountability purposes and to improve programme or service outputs (Leviton, 2014). Organisations with strong evaluation capabilities are able to design and use data-collection instruments, conduct surveys and interviews, analyse data, and refine evaluation practices over time (Huffman et al., 2008). Carman and Fredericks (2010) explored the evaluation capacity of NGO organisations, finding that NGOs generally fell under three types: the first type reported that they had a functional level of evaluative expertise; the second type had some capacity to implement an evaluation project but struggled with various areas of evaluation design, or implementation, or both; and the third type of organisation struggled with many aspects of evaluation, often reporting that they lacked basic knowledge and resources, along with limited support for evaluation from funders, management, or staff.

The ultimate goal of evaluation capacity development is the

establishment of a sustainable evaluation practice. This practice is where an organisation routinely asks evaluation questions that matter to both the organisation and the organisation's funders, and uses evaluation findings for decision-making and future organisational planning (Preskill & Boyle, 2008). The implementation of sustainable organisational evaluation practices can be difficult to achieve (Wandersman, 2014). For evaluation systems to be sustained, participants must be provided with leadership support, incentives, resources, and opportunities to transfer their learning about evaluation to their everyday work. Sustainable evaluation practice also requires the development of systems, processes, policies, and plans that help embed evaluation work into the way the organisation accomplishes its mission and strategic goals (Lennie et al., 2015). This approach can draw upon a range of methodologies and approaches, including action learning, action research, participatory evaluation, and holistic and creative approaches to organisational capacity development (Lennie et al., 2015). Suarez-Balcazar and Taylor-Ritzler (2015) have remarked that while evaluation capacity development initiatives have been steadily increasing within the NGO organisations, further work is required to assess the most successful adult learning theories that underpin these varied programmes.

Developing NGO capacity in New Zealand

In New Zealand from the early 2000s increasing importance was placed on building evaluation capacity in the NGO sector in order to reassure the New Zealand government and non-governmental funders that their resources are being well utilised (Casswell, 2001; Duignan, 2002). Funding for NGO social service providers had become increasingly contestable and difficult to obtain (Cayley, 2006). To be successful and sustainable, service organisations need effective financial planning, high levels of organisational competence,

and open evaluation techniques that ensure relevance as well as performance can be achieved through targeted and consistent capacity building support (Paton, 2006). Capacity building has been a priority for the New Zealand government for many years as a "whole of Government initiative" involving almost all departments working together to support this initiative (Paton, 2006).

Over recent years the Ministry of Social Development (MSD) has continued to invest in NGO capability development for example by funding capability mentors and providing a range of capacity building resources for social services organisations including organisational capability self-assessment tools, the organisational capability framework, and capability investment resources (Ministry of Social Development, 2015a, 2015b, 2015c). MSD also encourages service providers to use Results Based Accountability™ (RBA) to focus on the outcomes of their work (www.familyservices.govt.nz). However it is recognised that service providers use a range of complementary tools for measuring outcomes.

Furthermore, there is a growing focus on Māori and Pasifika organisations within the social service sector, and a need to develop culturally appropriate evaluation practices when engaging with these services (Duignan, 2002; Goodwin, Sauni & Were, 2015; Kennedy, Cram, Paipa, Pipi, & Baker, 2015). The establishment of culturally appropriate evaluation services is an evolving praxis with an ever-widening influence (Social Policy Evaluation and Research Committee, 2007).

Kerr (2012) reviewed kaupapa Māori theory and concluded that kaupapa Māori theory-based evaluation, arising from the specific context for evaluation of Māori programs in Aotearoa New Zealand, is a unique expression of evaluation theory and yet is potentially congruent with a number of theoretical developments in the international evaluation field including: collaborative evaluation, theory-driven

evaluation, constructivist/postmodern evaluation, and transformative evaluation. Similarly, Goodwin, Sauni and Were (2015) reviewed effective evaluation practice within Pacific Island and Māori populations, proposing that evaluators' cultural positioning along with the evaluation's methodological orientation was important, if not crucial, for effective evaluation outcomes. This was defined by the cultural fit and alignment with the values, characteristics, and language of the evaluated recipients. It is within this context that a programme for developing evaluation capacity was designed and delivered.

The case study: Dancing with Data evaluation capacity development programme

This section overviews the Dancing with Data (DWD) organisational evaluation capacity development programme. The programme objectives were to: (a) enhance understanding of the role of evaluation within an organisation; (b) develop an organisation-wide evaluation plan linked to an annual and strategic plan; (c) share best practice in conducting an internal evaluation and commissioning external evaluation; (d) identify ethical approaches to evaluation; (e) enhance understanding of a variety of evaluation tools and techniques; and (f) write success stories to include in the organisation's own reporting to the Trust.

An evaluation of the programme was undertaken to determine the extent to which the aim and objectives of the programme were achieved from the perspectives of the participants and stakeholders. The programme will be discussed next before the evaluation data are presented.

Dancing with Data programme overview

The DWD programme was offered between September 2013 and March 2014. All the Trust medium- and large-grant recipients for that

year were invited to participate. The DWD programme was designed as a practical programme aimed at improving organisation-wide evaluation practices for particular outcome-focused evaluations.

Previous research has identified four organisational factors that contribute to the success of evaluation capacity building: first, organisational leadership that supports the implementation and sustainability of evaluation capacity within an organisation; secondly, organisational culture that encourages questioning of organisational processes and promotes new approaches; thirdly, organisational structures that allow individual staff to step away from their primary responsibilities to participate in evaluation activities; and finally, an external environment that promotes accountability (Bourgeois and Cousins, 2013). The DWD programme endeavoured to address these four factors by targeting key senior stakeholder staff within each of the NGO organisations who had the authority to support organisational change, allow other staff to participate in evaluation activities, to encourage the development of an organisational evaluation culture, and to implement new innovative evaluation approaches. Participants were also encouraged to set their own achievement goals for the DWD programme. They were encouraged to partner with another organisation in the programme with the aim to share and reflect on their progress during the programme and to explore joint projects where they might collaborate and to meet evaluation goals.

Huffman et al. (2008), in a review of the evaluation capacity building literature, found that that many of the learning methods expounded in the literature focused on the provision of individual training and research skills, and implicitly assumed that enhanced individual capacity would affect organisational capacity. The DWD programme endeavoured to overcome this organisational or structural challenge by inviting participants to integrate their evaluation strategies, or plans, or both, into their organisational strategic plan

and annual plan, alongside their programme goals and outcomes.

When developing the content of the DWD programme, the delivery team drew on their experiences as tertiary educators and researchers to ensure participatory adult learning practices and the cultural context for Māori and Pasifika evaluation were features of the programme. It was agreed with the funder to offer a wide range of evaluation methods sourced from literature and conferences that potentially could be adapted to meet cultural contexts and individual organisation's needs.

Participant organisations

Of the 39 organisations invited to participate, 34 responded to the invitation and attended most of the workshops. In the end, 24 organisations completed an evaluation plan, with 20 of these organisations submitting it by the due date and an additional four obtaining feedback after the programme ended. See Table 1 for a summary of types of participant organisations and details of participation. Each NGO was represented by one or more key senior staff (e.g., director, programme manager, operational manager) who were expected to attend for the duration of the programme and who had the authority to implement an evaluation plan across the organisation. Participants were asked to commit to the whole programme (although this had variable success as will be discussed below) and to be familiar with their organisation's current evaluation plan, as well as to have a good working knowledge of their annual/operation plan and strategic plan.

The 34 agencies who accepted the invitation to participate in the programme were clustered into three different cohorts based on the level of similar-sized grants received by the Trust, and also in terms of evaluation capability (according to Carman and Fredericks' (2010) classification of evaluation capacity). The average size of the grants for cohort 1 was $37,000, for cohort 2 was $26,000 and for cohort 3 was

$23,000. The first cohort additionally had a functional level of evaluative expertise, mostly already involved in significant data collection and evaluation projects. The second cohort reportedly had some capacity to implement an evaluation project, but struggled with evaluation design and implementation. The third cohort comprised small organisations with limited resources and capacity—even for robust data collection. They reportedly struggled with many aspects of evaluation. Most of the organisations reported limited support for evaluation from funders, management, and staff. Whilst the first cohort seemed to be able to devise creative ways of obtaining resources, the other cohorts were allegedly left to their own devices or ad hoc support (see Table 1).

Overview of key programme content

Total contact time for the programme was 6 hours, with an additional 6 hours of participant's own development time allocated to this programme. The programme comprised three workshops of 2 hours' duration for each cohort. There was also an expectation of completion of some development activities such as reading relevant journal articles, meeting up with an evaluation buddy to discuss and reflect on implementing new evaluation methods and their organisation evaluation plans (about 2 hours of participant's own time) between the workshops. The first workshop was conducted in September 2013, second workshop in November 2013, and the third workshop in March 2014. The programme funders and delivery team expected that, as a result of the DWD programme, participants would meet the programme aim and objectives. However, participants were also given the opportunity to set their own goals of what they would like to achieve at the beginning of the first workshop. Participants were encouraged to buddy up with another organisation to share and reflect their progress during the programme and to explore options where they might collaborate to meet joint goals.

Table 1. Types of Participant Organisations and Details of Participation

Cohort organisation type (Three cohorts)	Number of participant organisations and workshops attended (*n*=34)	Number of organisations that attended each workshop	Organisations that submitted an evaluation plan (*n*=20*)
Cohort 1: *Large well-established NGOs (many staff/volunteers) that received medium to large grants. The average grant was $37k.* Youth organisations, housing trusts, social services (broad range), budgeting services and migrant services	**12 participant organisations**	**Workshop 1:** 10 **Workshop 2:** 9 **Workshop 3:** 8	8 organisations completed evaluation plans by the due date
Cohort 2: *Medium-sized NGOs (several staff/volunteers) that received medium sized grants. The average grant was 26K.* Health trusts, family wellbeing services, adult literacy, services for people living in poverty, an organisation against family violence, and a community centre	**11 participant organisations**	**Workshop 1:** 10 **Workshop 2:** 9 **Workshop 3:** 8	7 organisations completed evaluation plans by the due date
Cohort 3: *Small NGOs (few staff/volunteers) that received medium sized grants. The average grant was 23K.* Budgeting services, ethnic foundations, college inclusion unit, English school programmes, youth rūnanga group and an ethnic women's group	**11 participant organisations**	**Workshop 1:** 9 **Workshop 2:** 7 **Workshop 3:** 7	5 organisations completed evaluation plans by the due date

* An additional 4 organisations submitted evaluation plans after the programme ended.

In the first workshop, called "Partnering Up", the context of out-comes-focused evaluation (international, national, local) was discussed, along with an overview of best practice in organisational evaluation drawn from literature and evaluation conference presentations. There was also an opportunity for each organisation to reflect on its current practice in evaluation and reporting, and to begin designing an organisation evaluation plan. During the first workshop participants were asked to partner with another organisation for a variety of evaluation activities and to complete joint homework tasks such as discussing readings on evaluation for the next session.

In the second workshop, called "Choosing the Music", the typical lifecycle of evaluation in relation to organisational needs, goals, and reporting to funders and stakeholders was discussed, along with various forms of evaluation (e.g. formative, process, summative, and impact) and popular and contemporary methods of evaluation. The value of consistent links between an organisation's evaluation plan and its strategic plan, annual plan, and programme goals and outcomes were demonstrated.

In the third workshop, called "Dancing with Fellow Stars", each organisation's evaluation plan was further discussed in relation to the organisation's annual plan and strategic plan. Participants reported back on methods of evaluation they had tried. This workshop finished with a future focus that invited organisations to use their evaluation data to inform their own organisation needs, to prepare funding proposals, and to support the writing of client or organisational success stories. The organisations were also offered post-workshop support in carrying out evaluation plans and supplying a final evaluation report to the SKYCITY Auckland Community Trust.

Evaluation of the DWD Programme

Although we are not yet able to report on the outcomes and longer-term practice benefit of the DWD programme, there were various layers of evaluation which allowed an assessment of the perceived benefit of the programme—some conducted more formally than others. As part of a formative assessment, we solicited informal feedback during the course of the workshops. Participants were invited to identify the types of evaluations they were undertaking and common challenges in undertaking evaluation; list practice tips for good evaluations from their own experience; and comment on learnings they gained from the sessions.

On completion of the programme, a participant survey was conducted via the online Survey Monkey facility to determine, from participant perspectives, the extent to which the aim and objectives of the programme were achieved. The survey was anonymous and voluntary with a number of statements which required responses on a five-point Likert rating scale (from agree to disagree), and also offered an opportunity to comment. Four open-ended questions were also included, aimed at soliciting responses about the most and least valuable aspects of the programme, areas for improvement for future initiatives, and comments on the perceived value for the organisation in undertaking evaluations. The 24 organisations that completed an evaluation plan were invited to participate in the survey. From these organisations, 13 responses were received. However, there were multiple responses from every respondent to the open-ended questions, which provided rich qualitative data. These responses were analysed thematically.

Additionally, three NGOs (two small youth and budgeting services and one medium-sized social service organisation offering a broad range of services) agreed to video interviews about their experiences

of participating in the DWD programme. These interviews aimed to explore first hand what had worked well and what could be improved in the DWD programme. With agreement of the participants, edited highlights of the video clips were shared at the SKYCITY annual recipient function as part of a presentation on DWD. The themes from these interviews were consistent with the findings from all other evaluations and are integrated into the findings below.

Key stakeholder face-to-face interviews were conducted with the community trust manager (representing the trust) and the AFC grants and project manager. The interviews explored their views on what worked well and what could be improved for the two evaluation framework initiatives: (a) use evaluation to improve grant-making practices; and (b) fund DWD to help develop evaluation capacity in their grant recipients. No structured interview guide was used for these interviews as the managers were encouraged to provide information on what they believed were the most important issues. The data were analysed thematically. The findings from all these evaluation activities are discussed in the next section.

Findings from the programme evaluation

The strategic goals of the partnership were focused on developing evaluation capacity building in the sector. To support this, the DWD programme objectives were aimed at an enhanced understanding of the role of evaluation within an organisation and the benefits of an organisation-wide evaluation plan. On a more operational level, the programme aimed to facilitate sharing of best practice in conducting an internal evaluation and commissioning external evaluation, and to enhance understanding of a variety of evaluation tools and techniques to strengthen the organisations' reporting. The stakeholders and the majority of participants reported favourably on the value of the programme in all these areas through the various layers of

evaluation conducted. Several themes emerged during the evaluation of all the evaluation data collectively, as will be reported below.

Enhanced understanding of the role of evaluation

In thinking about the strategic aim of the programme, the Trust and AFC managers commented that the programme was relevant for all the participating organisations (small to big), as all participants developed an understanding and knowledge on more than just the material offered—they developed insights on the value of evaluation for the organisation and for practice.

> We intended a general increase in understanding and knowledge [of evaluation methods and practices, […] they left the room with a lot of inspiration with what evaluation could do for them, now and in the future, that was really exciting. (Stakeholder)

The programme also helped to build relationships between the funder and recipients and provided opportunity for organisations to learn from one another.

> The networking that was going on, […] of gosh you do things that way and I could do that too, even if they were completely different organisations. (Stakeholder)

This sentiment was echoed by participants, as captured in this statement:

> The opportunity to be around the table with other people that sharing of what's really going on and what the challenges are and being honest about that was really exciting. (Participant)

For many participants, the programme provided them with an increased understanding of the value of evaluation and how evaluative data can be used to strengthen the organisation. The programme reportedly helped to broaden participants' understanding of evaluation, thus alleviating some of the "fears" some small organisations held about undertaking evaluation:

> It took the fear away. Evaluation is a really scary word, especially for the small organisations who have their heads down doing the work and don't have time for administration let alone evaluation, so for them to lose a bit of fear about that and actually see the potential of it was quite exciting. (Stakeholder)

Previous research has identified that an organisation looking to develop evaluation capacity needs to be convinced that the organisation will benefit from allocating resources to implement and maintain an evaluative data collection process (Leviton, 2014). Two participants commented on this dynamic:

> The programme has helped to reduce cynicism about evaluation. It's not just a thing to tack on the end [of a programme] for funders but [it is] about helping to achieve the organisation's mission. This has been quite a revelation. (Participant)

> We are going to imbed evaluation as a tool in the future—to gather data on an ongoing basis of how effective we are in helping clients to meet their goals. (Participant)

Participants offered suggestions to the funder (which have broad relevance to all evaluators and funders) of what could be done to help support evaluation:

> When evaluation is funder driven, it is harder for organisations to eliminate bias and as such there is a tendency to present only positive data. There needs to be a mutual understanding between the funder and recipient to overcome this challenge and to encourage learning for improvement. (Participant)

> Resourcing is required for evaluation and support to ensure that it is done well. (Participant)

> We require help to develop skills within an organisation to undertake and commission evaluation. (Participant)

Developing an organisation-wide evaluation plan

Closely linked to the increased understanding of the role of evaluation was the reported benefit of the opportunity for organisations to develop an evaluation plan linked to their operational and strategic plans. This activity was regarded as the most valuable aspect of the programme:

> The evaluation plan was definitely useful, because even for those organisations that had been doing good evaluative activity; had good surveys that they had tweaked over the years—I don't know if they had that bigger picture of why they were doing it, for other than funder accountability. (Stakeholder)

Participants, too, commented on the value of re-thinking the link between evaluative outcomes with not only funder expectations and needs in mind, but as it relates to the organisation's own evaluation plan, and annual, operational, and strategic plans. Even though not all organisations completed an evaluation plan, those that did reported benefit in doing so:

> Developing an evaluation plan and then have it evaluated and given feedback was very helpful. (Participant)

Even throughout the workshops, a focus on developing an evaluation plan was reportedly valuable. At the end of each workshop, an informal round robin was held where participants reflected on (among other things) the development of their evaluation plans, and useful take-home messages to share with their organisations. Some of the learning that was shared demonstrated staff buy-in, and some clearly had governance buy-in. On the whole, the plans reflected a greater use of a variety of evaluation methods and clearly identified the purpose and type of evaluation to be undertaken, such as formative, process, and summative evaluations. Participants identified that the most common evaluation undertaken was summative—mostly for

accounting to funders. There was also agreement that, on the whole, more monitoring outputs than other forms of evaluation was carried out and that a clear shift was needed towards outcome-focused evaluation as opposed to output monitoring.

Several organisations reported that they more regularly commissioned evaluation as they did not have the in-house expertise and preferred to have experienced evaluators who brought perceived independence and credibility to the evaluation. Participation in the DWD programme, however, increased the likelihood of implementing evaluative practices within their organisational structure, as summarised by this statement:

> [Planning our own] evaluation will be a higher priority for us now. (Participant)

There were various views on how this can be achieved though. One participant commented as follows:

> We have developed a plan but have also decided that our first evaluation will [still be] sourced externally; to kick off with a skilled provider initially. (Participant)

Another stated:

> What has been highlighted to me through this process is that my different managers have different levels of ability in this area, so this was good for me to step back and analyse who is doing what internally, and who would benefit from some coaching and development in this area. (Participant)

Knowledge and skills in conducting evaluations

The participants reported significant value from the content of the workshops including providing time for them to reflect on their current evaluative practice and to learn about a variety of evaluation tools that could be applied to different cultural and organisational contexts, as is evident from these statements:

> I loved the logic model. (Participant)

> Learning about different evaluation models; that different evaluations can have different applications and audiences. (Participant)

> How best to evaluate the project with our Māori partners in terms of programme delivery and outcomes for families—Dancing with Data gave us ideas. (Participant)

> It [DWD] allowed a rare opportunity to reflect on our [data gathering and evaluation] practice. In the future we are going to gather more effective and ongoing feedback. (Participant)

Key stakeholders offered similar comments in their interviews. They suggested the programme gave time for reflection on evaluation practices and provided best-practice models:

> I think we unleashed people, I genuinely think that there were heaps of groups there that suddenly looked at their achievements differently. (Stakeholder)

> They (organisations) realised that this doesn't have to be difficult. That they could tell the story about Joe Bloggs … and the changes that occurred for him as a result of their programme … and that it could have just as much impact as if they went through all the paperwork and reports. (Stakeholder)

Participants were able to share in the workshops common challenges on conducting an evaluation. During the workshop these issues were discussed and potential solutions considered. A summary of these responses are listed below:

· illustrating intangible outcomes, such as a client's increased confidence

· evaluating services that have no defined end-point; measuring quality

· finding a balance between evaluating funder's outcomes and

practice outcomes; ensuring internal evaluations are done objectively

· capturing accurate, reliable and consistent data

· getting honest responses from clients and using the right tools to elicit this

· doing follow-ups when people have exited the programme/service.

(Workshop participants)

Barriers to successful implementation were also reported by workshop participants and included the following:

· limited or no funding to conduct evaluations

· limited time to allocate to the evaluation process

· getting staff buy-in

· balancing data collection required for government and funder contracts with evaluation for an organisation's own learning.

(Workshop participants)

Some good practice tips for evaluation were noted by workshop participants. These include the following:

· embed evaluation in from the beginning of the programme/activity

· ensure robust programme logic and link to wider organisational goals

· ensure that there is an evaluation plan that is relevant and able to enacted and also ethical issues should be addressed upfront before undertaking any evaluation.

(Workshop participants)

In thinking about data collection, participants suggested:

· having an evaluation plan makes data collection more systematic

· making data collection relevant to the organisational context and culture is essential

- utilising a variety of data collection methodologies not just sticking to a traditional survey
- training staff on how to collect data and demystify evaluation.

(Workshop participants)

Programme design and delivery

Feedback about the programme revealed that all participants valued the information, methodology, and training delivered throughout the three workshops. Participants reported that the evaluation programme was practical and understandable. The evaluation resource folder that each recipient organisation received was valued. The following comments summarised the remarks of many participants:

I did find the material provided was quite good, and in a format I could pass on to some of my team. (Participant)

The reading materials offered a great additional resource. (Participant)

Others commented:

I thought it was well structured—good content and a good mix of having reading, having someone speak to us, discussion as a group, and activities to put into practice. (Participant)

The evaluation tools are very useful and learning about them was a very practical benefit. (Participant)

Many participants also reported on the value of engaging in a face-to-face learning process, rather than relying upon a web-based resource to advise them. This finding was consistent with previous New Zealand research reporting that organisations within the voluntary and community sector prefer face-to-face capacity building support with real people, rather than web-only based programmes (Cayley, 2006). Participants remarked that they also valued the opportunity to share their organisational learnings and challenges with other

NGO staff, and that there was a lot to be gained from sharing with peers. One respondent remarked:

> It gave time for reflection in between (to) go away and think about it and reflect on whether it worked for you. If we had it all in one day there wouldn't have been nearly as much take out … The workshops gave us food for thought about the process and culture of learning.

Participants were given the opportunity to set their own goals of what they would like to achieve at the beginning of the first workshop. These goals centred on extending their range of evaluation tools as well as learning from other organisations about how they did evaluation. An informal evaluation at the final workshop indicated that these goals had been met by the majority of participants. Participants were also encouraged to buddy-up with another organisation to share and reflect their progress during the programme and to look for possible projects where they might collaborate to meet joint goals. Because of personal time constraints several participants were not able to maintain contact outside sessions. Those who were able to maintain contact reflected on the value of the opportunity to network and to reflect on evaluative practice. The stakeholders made particular mention of the high level of commitment by participants:

> To commit to three workshops over seven months made it a bit easier. (Stakeholder)

Broader impact

In considering the formal and anecdotal feedback on this programme, it became clear that the benefits of the programme extended beyond the original goals. Many authors have written about secondary benefits of practice collaborations, which are usefully summarised by Yawn et al. (2010). According to these authors, these include: more effective teamwork; practice adaptation and extension of the study tools; increased professional self-worth and community recognition;

opportunity and support for staff members "stretching" into new roles; and increased research literacy within the practice. We can't claim that such elaborate benefits have been achieved. However, some of the findings above certainly are an indication of wide-ranging benefits, as are elements from the interviews with the managers as key stakeholders to this programme. According to them, the DWD programme had a broader impact on both participants and the Trust:

> I think even the fact that they [participants] could take what they had learned in Dancing with Data to other funders, to their trust boards, to other agencies that they work with … it wasn't something that was isolated to just them and us. (Stakeholder)

> We learnt so much about the role that the Trust could have in helping them do more with the money they have. (Stakeholder)

The Trust embarked on a journey a few years earlier which involved establishing their strategic direction on the basis of the social needs of Auckland and to ensure evidence-informed grant making that results in a positive benefits for the community. The Trust was also interested in encouraging collaboration and generosity to community organisations making a difference in their respective communities. It was noted that it was difficult for some trustees to let go of the freedom to fund a wide range of organisations in an ad-hoc manner (not particularly linked to a strategic plan), or, as one trustee described, of being "Father Christmas". However, there was a commitment to continue to improve their grant making.

> Over time we have moved from needing services [of AFC] to having them as a trusted partner alongside us, rather than just purchasing a piece of research … we've been able to influence the way ACF operate as well because [of what] we've been able to fund. (Stakeholder)

This move to more strategic funding is consistent with a trend within the whole philanthropic sector to undertake more strategic

grant making. The Trust prioritised its funding in 2013 towards pro-grammes that make a difference to family/whānau social health and wellbeing through supporting families to thrive and communities to prosper. The Trustees were looking to continuously improve their grant making practices including the evaluation of grants made. In order to build capacity they have engaged ACF to develop an eval-uation framework to establish the value and cumulative impact of projects funded.

> The Trust was becoming clear on what it wanted to give to but didn't know if it was making a difference. We felt from our advice [from AFC], the Trust, had a certain, duty of care that if you're going to change the process of Trust funding to include the extra step of asking for accountability that is outcomes-based then you must equip them [grant recipients] with some of the skills. (Stakeholder)

> ACF put together what best practice philanthropy looked like and in that included a percentage for evaluation and research, so this was something that we'd never thought about, we'd done accountabil-ity really strongly, we had never considered evaluation, it was not a word we ever used. (Stakeholder)

It was hoped that an evaluation framework would improve the Trustees' understanding of the impact made in the community by the projects that they have funded and will ultimately help them to refine the definition and criteria for future family/whānau social health and wellbeing grants. Part of the evaluation framework devel-opment was to build grant recipient evaluation capacity. Developing an evaluation framework for the Trust to evaluate its grants was a significant change to the way the Trust had operated. The Trust was also committed to supporting grant recipients to improve their own evaluation practices. There was a realisation from the Trustees that there was "a genuine need to inform ourselves". Not only did the Trust fund the Dancing with Data evaluation programme, but

the manager actively took part in the design and implementation. Dancing with Data was also a stimulus for the Trust to think more strategically about the outcomes of the projects it funded within their identified priority areas of family wellbeing and financial literacy.

> We were suddenly thinking ourselves about the outcomes of Trust funding. We looked at what outcomes they are achieving and how does that meet our vision. (Stakeholder)

Conclusion

The case study reported in this article between a funder, fund recipients, and intermediary stakeholders enabled increased understanding of evaluation and the value of evaluation plans. The learning objectives of the programme were successfully met as evidenced by the majority of participants completing an organisation-wide evaluation plan and using a wider range of evaluation tools to evidence outcomes to inform their development and funding applications. Participants valued sharing evaluation experiences and some formed new collaborations. The majority of evaluation plans met or exceeded expectations with a few needing further assistance to complete. Recipients reported increased awareness of evaluation practices, innovative ways of collecting evaluation data and insights into the bigger evaluation plan for the organisation. This has real implications for practice and it will be interesting to see how the quality of reporting changes in the future. Participants expressed a need for ongoing training in developing evaluation plans and ways to enable robust evaluation of data. This was expected, as a 12-hour commitment can hardly be seen as providing all of the knowledge practitioners may require in this regard. Consideration will have to be given to the next phase of this initiative.

The authors had intended that the DWD programme would contribute to building capacity with the Trust recipient NGOs to undertake and to commission evaluation. The evaluation resource folder

that was added to at each workshop provided an ongoing reference for participants and the development of an organisation evaluation plan provided a structured approach to incorporate evaluation into their plans. It is our belief that the participant feedback that was ongoing throughout the programme and post-programme online evaluation, as well as key stakeholder interviews, indicated that the programme achieved its intended aim and objectives for the majority of the participants, regardless of the size of the NGO. The challenge in the future for DWD is to incorporate a stronger cultural component that more makes more explicit cultural contexts and responses, in particular for Māori and Pasifika.

Furthermore, the Trust increased understanding of grant-making practices from this programme and of the value of integrating evaluation into their operational and strategic plans. What is most exciting about this whole venture though, is that significant value has been reported from a programme that evolved organically with an original commitment by one funder to ensure that practice effectiveness is demonstrated. Imagine what could be achieved if we had more stakeholders committed to such practices. The degree of time involvement, commitment, risk, interdependence, power and trust will vary in any practice collaboration, but the implications for evaluation practice will make it worth it.

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