The Urban Institute

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Evaluation Matters

Lessons from Youth-Serving Organizations

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The World Bank Group Community Outreach Program

This report received support from the World Bank Group's Community Outreach Program, which seeks to leverage local dollars and opportunities to improve outcomes for nonprofit organizations in the metropolitan Washington area.

Since its inception in 1997, every program and initiative of the World Bank Group's Community Outreach Program has focused on putting the Bank Group's core mission of reducing poverty into action in the Bank's host city of Washington, D.C., and its surrounding metropolitan area. With a vision of Making a World of Difference Locally, the Community Outreach Program encourages and enables Bank staff, whose daily work is focused on promoting economic development and reducing poverty in developing countries, to show their concern and generosity to the most disadvantaged populations in the Greater Washington region. Its program activities concentrate on three main areas: charitable giving, technical assistance, and staff volunteerism.

Photo courtesy of DC SCORES. Photographer: Paul Morigi.

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Foreword

Nonprofits add tremendous value to the Washington metropolitan area. Among many other things, they work to raise the quality of life of, and serve as a lifeline for, the most vulnerable populations. They also play an important role in our local economies.

In the current environment of extremely competitive fundraising and increasingly limited dollars, nonprofits face a growing demand for evaluation information. Nonprofit agencies' ability to report on program performance has become essential to organizational legitimacy and survival. This requires better collection and evaluation of data, increased strategic use of evaluation data, and more sophisticated messaging practices. Evaluation must take into account multiple dimensions besides the bottom line, including the organization's mission, structure and capacity, life stage and experience, culture, and context.

The East of the River (EOR) Initiative was designed to offer a practical approach to help selected nonprofit agencies develop evaluation capacity by providing funds for a new evaluation staff position and intensive technical assistance to help set up the necessary strategies and structures for evaluation and monitoring. As this report shows, the technical assistance provided by the Urban Institute helped the nonprofits measure and, in some cases, improve their performance; and more importantly, we believe, illuminated underlying challenges in nonprofits' efforts to systematically measure and communicate their contributions on behalf of clients served and to the larger community.

From the World Bank Group's perspective, we believe the EOR Initiative was successful on various levels. As a result of this effort, we understand even more how valuable and necessary so many of the nonprofits in our community are; we also realize their need for continuing support so they can be healthy and sustainable organizations. It is our hope that this EOR report will help build awareness and appreciation for the evaluation activities in nonprofit organizations and that our lessons learned will not only offer insights to funders and others in the nonprofit sector but also help facilitate a more robust dialogue between funders and others about how future capacity-building efforts might be designed or enhanced so opportunities for youth continue to increase and improve.

We thank the Urban Institute team for its work, patience, and willingness to adapt. We also thank our other EOR Initiative partners including the Nonprofit Roundtable of Greater Washington, DC Youth Investment Trust Corporation (funder), Friedman Billings Ramsey (funder), the Georgetown University Center for Continuing Studies' Center for Social Impact Communication, and an anonymous additional funder. Finally, we thank our four nonprofit partners (Urban Alliance, Metro TeenAIDS, Facilitating Leadership in Youth, and Youth Power Center) as they undertook the most difficult task of all.

Viki Betancourt, Community Outreach Manager
Walter D. Woods, Program Officer—Community Specialist
The World Bank Group, Community Outreach Program

Introduction

For many nonprofit agencies, evaluation may be narrowly perceived as an unnecessary burden that diverts scarce resources from serving clients or communities in need. For others, evaluation may be considered a necessary, but secondary, activity for meeting the condition of grant reporting requirements—that is, primarily a compliance function.

For a small but growing number of agencies, however, evaluation is increasingly seen as a way to learn whether their organizations are producing satisfactory results. In other words, evaluation can be a valuable tool to help nonprofits learn about achieving their goals effectively and to make strategic decisions about the best use of limited resources. Viewed from this perspective, evaluation can help agencies improve performance, serve larger numbers of clients, and justify requests for expansion of their programs.

Evaluation can take many forms. For most nonprofits with limited budgetary or staff resources, outcome measurement offers a relatively low-cost approach to help nonprofits define and use specific indicators to regularly measure how well services may or may not be leading to intended results. In some cases, more rigorous and costly evaluation designs may be warranted, but these are not expected to be the norm for most nonprofit agencies.

Regardless of whether the demand for evaluation information is created by external (e.g., funders, donors, the public) or internal (e.g., board leadership, agency management, clients) sources, evaluation can no longer be viewed as optional or discretionary. Nonprofit agencies' ability to report on program performance is becoming essential to organizational legitimacy and survival. Evaluation needs to be seen as "mission critical" and, as such, serve to create a feedback loop integrated with all essential agency functions: decisionmaking, resource allocation, day-to-day management, communications, and advocacy. With the growing trend toward accountability, nonprofits must become more adept at effectively demonstrating and communicating their value to donors, clients, and the public.

Through observation, commentary, and detailed case studies, this report illustrates the evaluation experiences of youth-serving nonprofits that participated in the East of the River Initiative. These lessons are expected to be of interest to other youth-serving nonprofits, funders interested in helping further extend nonprofit agencies' capacity for evaluation, and technical assistance providers.

East of the River Initiative

The East of the River (EOR) Initiative is an effort by the World Bank Group's Community Outreach Program to help nonprofits serving older youth in Washington, D.C., better identify, measure, and communicate their community impact. The World Bank Group funded the three-year initiative, beginning in 2006. The initiative is termed "East of the River" because of the World Bank Group's desire to focus its efforts on the most disadvantaged sections of the city, many of which lie east of the Anacostia River. These communities have a disproportionately large share of youth relative to the rest of Washington, D.C.—and a disproportionately small share of financial and educational resources. For example, in Ward 8, where two of the nonprofits operate, 47 percent of youth live in poverty—compared with 28 percent of youth in the District overall. In practice, two of the nonprofits operated exclusively in communities east of the

Why Measure Program Performance?

Although evaluation of nonprofits has been ongoing for decades, much of it has been performed by external evaluators or in response to requirements associated with large federal grants. Not only were these evaluations expensive, but also the findings and results were often published in journals or reports to the federal agency, which for the most part were inaccessible to agencies and service providers. In the 1990s, a few events transformed the landscape of evaluation in government and nonprofit agencies. First, the Government Performance and Results Act of 1993 required federal agencies to develop strategic plans and to report annually on program performance. A few years later in 1996, the United Way of America released a new framework for measuring performance of human services agencies ("Measuring Program Outcomes: A Practical Approach"). This report laid important groundwork for all nonprofits, by attempting to shift the emphasis from reporting on how many dollars are received or volunteers an organization has to measuring whether programs make a difference in the lives of people. Since the mid-1990s, many nonprofit consortia, funders, and even software companies have adopted performance-based approaches to monitor program activities, all to help agencies improve programs and services. In May 2009, the Obama administration announced plans to request $50 million from Congress for a Social Innovation Fund "to identify the most promising, results-oriented nonprofit programs and expand their reach throughout the country."[1]

Anacostia River, while two drew youth predominately from these areas but also served youth from other disadvantaged parts of the city.

The World Bank Group selected the Urban Institute to complete two components of the EOR Initiative. The first, concluded in June 2009, collected information on local best practices and indicators to develop a *community-level assessment* of youth needs in the District of Columbia. The goal of the community-level assessment was to help the agencies, and other youth service providers, place their programs within the broader context of community need. The resulting report, *On the Road to Adulthood,* highlighted the many challenges young people in the city face in making a successful transition to adulthood, including poor educational outcomes, lack of preparation for the high-skills labor market, and long-standing health problems. The report provided comprehensive indicators and analysis on the state of older youth (age 12–24) and examined the role of area nonprofits that work with young people, their families, and neighborhoods.[2]

The second component is the basis of this report. From a pre-selected set of organizations serving more than 50 youth a year in Washington, D.C., and with operating budgets under $1 million (at the time of their selection), the World Bank Group, with input from the Urban Institute, selected four nonprofits for participation in the *organizational assessment* portion of the EOR Initiative. These four nonprofits were Facilitating Leadership in Youth, Metro TeenAIDS, Urban Alliance, and Youth Power Center.

Selection was competitive. The criteria included each groups' previously demonstrated commitments to measuring their effectiveness and their eagerness to improve ongoing evaluation efforts. In the selection process, the World Bank Group sought nonprofits with sufficient capacity to create and sustain an evaluation plan, yet also with sufficient need for the support provided.

Under the organizational assessment component, the World Bank Group fully funded an *evaluation specialist* for two years in each of the four chosen EOR agencies. This evaluation specialist was to be supported by technical assistance from the Urban Institute.[3] Funding for an evaluation specialist was a unique aspect of the EOR Initiative and was meant to contribute a dedicated staff resource to evaluation and monitoring activities. The goal was first to alleviate the burden of having to fundraise for this position, and second to provide agencies with a targeted resource to engage in design, development, and implementation activities over a two-year period. During this period, it was hoped that an evaluation framework with supporting strategies and tools could be established, and that agencies would identify appropriate strategies or solutions for sustaining evaluation activities beyond the term of the initiative.

To fulfill the goals of the initiative, the Urban Institute provided two years of individualized technical assistance to each organization. The nature of the technical assistance was twofold. Each agency's evaluation specialist received one-on-one assistance specific to his or her program needs, evaluation goals, or objectives, and in consideration of the evaluation skills and experiences present within the organization. In addition, the Urban Institute team convened evaluation specialists monthly to provide instruction on specific topics of interest to all groups (e.g., how to design a logic model, the components of an evaluation plan, and how to assure confidentiality for clients and related data) and to provide an opportunity for peer interaction.

EOR Initiative Objectives for Participating Agencies

- Develop organizational outcome assessments unique to the nonprofit's program offerings
- Create a comprehensive evaluation plan that links these assessments with each groups' target audience and sets forth data collection sources and strategies
- Build organizational capacity by devoting one staff member for the duration of the initiative to work full time on evaluation and involving other key stakeholders within the organization
- Begin implementing the designed evaluation plan
- Improve the nonprofit's effectiveness by using the information gathered for program planning, agency resource allocation, continuous learning, and management and accountability
- Improve communication and dissemination of program outcomes to internal and external audiences

Scope of This Report

This report summarizes the experiences of the Urban Institute team in providing technical assistance on outcomes management to the four EOR organizations. It identifies both successes and challenges encountered, with an emphasis on key lessons learned in the process. While we expect this report to be of interest to the World Bank Group, which funded the EOR Initiative, we also hope that the information provided will be of value to other Washington-based grant makers or donors, the four participating agencies and other youth-based community organizations in the greater Washington metropolitan area, evaluation consultants, youth advocates, and, more generally, anyone with an interest in how nonprofits can more effectively measure and report on what they contribute to the community.

While most of the findings and examples detailed in this report are based on the experiences of the four participating agencies, our work with this and other capacity-building initiatives suggest that many lessons are applicable or can be extrapolated to other youth-based community organizations and nonprofits throughout the District and beyond. In limited cases, the findings and recommendations expressed in this report draw from the wider experience of the authors.

This report is not intended to serve as a "soup to nuts" approach to evaluation. Many such guidebooks have already been written, and we include a list of some of these in the resource appendix to this report. Rather, this report is intended to document, illustrate, and analyze how four youth-serving agencies in the District of Columbia used World Bank Group and Urban Institute support to build organizational capacity in order to plan and implement a more coherent and effective evaluation strategy. Hopefully, these lessons will spark a more thoughtful conversation around how to better integrate and coordinate evaluation activities from the perspectives of both nonprofit agencies and grant-making organizations.

The report is divided into eight sections, including this introduction. The next section introduces each of the four agencies and describes key organizational characteristics. The report then highlights key findings tied to the agencies' activities during the organizational assessment of the EOR Initiative and lays out key factors that likely played a role in how much the agencies were able to benefit from the assistance provided. Case studies for each of the four agencies follow, to detail what happened and under what conditions or contexts. The report concludes with recommendations to grant makers, nonprofits, and technical assistance providers that may be interested in pursuing this particular model of assistance or any of the lessons documented throughout this report. The appendices contain supplemental materials.

Exhibits 1 and 2 explain key terminology used throughout this report and summarize the key steps in planning and designing evaluation.

Exhibit 1. A Glossary of Evaluation Terms Used in This Report

Evaluation: A systematic way to learn from past experience by assessing how well a program is working. A focused program evaluation examines specifically identified factors of a program more comprehensively than from experience that occurs day to day.

Evaluation plan: A written document to guide evaluation work, including the evaluation objectives, questions that will be answered, data that will be collected to answer these questions, and a timeline for data collection.

Impact: The change in condition or benefits to individuals or communities that can be attributed to a particular project, program, or policy.

Logic model: A framework for describing an organization's work that links inputs, activities, outputs, and outcomes.

Performance (or outcome) measurement: The regular, ongoing measurement and reporting on important performance aspects of programs. Outcome measurement intentionally focuses on the outcomes or results of program activities and delivered services.

- **Inputs:** Program resources used to produce outputs and outcomes.
- **Outputs:** Activities and services delivered; the completed products of internal program activity. Outputs are expected to lead to desired outcomes, but they do not by themselves reveal anything about the results of the work produced.
- **Outcomes:** The consequences of the program's activities and services (as opposed to the activities and services themselves), and what happened outside the program to populations the program hopes to affect.
- **Intermediate outcomes:** Outcomes that are expected to lead to the ends desired but are not ends in themselves.
- **End outcomes:** The desired results of the program. Many programs can lead to both short-term and long-term end outcomes.

Sources: Harry Hatry, *Performance Measurement: Getting Results,* 2nd ed. (Washington, DC: Urban Institute Press, 2007); U.S. Department of Housing and Urban Development, Office of Policy Development and Research, *A Guide to Evaluating Crime Control of Programs in Public Housing* (Washington, DC: U.S. Department of Housing and Urban Development, 1997); and U.S. Environmental Protection Agency, "Evaluation of Environmental Programs," http://www.epa.gov/evaluate/index.htm.

Exhibit 2. The Evaluation Process

1. Identify the program's mission, objectives, and clients.
2. Identify outcomes that the program seeks.
3. Hold meetings with interest groups to vet desired outcomes.
4. Select specific indicators for measuring each outcome.
5. Identify appropriate data sources for each indicator and data collection procedures needed to obtain data.
6. Develop data collection instruments.
7. Identify specific breakouts needed for each indicator (such as demographics, geographic location, etc.).
8. Identify appropriate benchmarks against which to compare program outcomes.
9. Determine roles for program partners, such as project grantees and contractors, in developing and implementing performance measurement process.
10. Identify uses of performance information by agency personnel.
11. Develop analysis plan—ways that the performance data will be examined to make findings useful.
12. Prepare long-term schedule for implementation, including timing of data collection and analysis relevant to each year's budget cycle.
13. Plan, undertake, and review pilot test of new or modified data collection procedures.
14. Collect initial wave of outcome data.
15. Examine outcome data.
16. Select formats for presenting performance information.
17. Report findings.
18. Use the outcomes information for program improvement.

Source: Adapted from Harry Hatry and Linda Lampkin, *Key Steps in Outcome Measurement* (Washington, DC: The Urban Institute, 2003).

Agency Profiles

Under the East of the River Initiative, four youth-serving nonprofit agencies in Washington, D.C., received technical assistance from the Urban Institute to bolster their internal evaluation capacity. The World Bank Group chose the four organizations from a pre-selected group of 12. The participating organizations exhibited a considerable degree of diversity; the four selected groups differed in their programmatic emphases, organizational structures and sizes, previous experiences with evaluation, and goals for their evaluation. Although the groups approached the initiative with varying degrees of experience in program evaluation and differed in how well they were able to build a robust evaluation capacity, all four developed as both consumers and producers of information. Exhibit 3 briefly introduces key aspects of the four agencies.

Facilitating Leadership in Youth (FLY), a small nonprofit located in southeast Washington, D.C., works with youth age 8 to 24 to help them develop their artistic talents, achieve their educational goals, and expand their leadership roles. The organization, incorporated in 2002, is the youngest of the four nonprofits participating in the East of the River Initiative. FLY supports youth through a comprehensive, long-term development approach that engages participants in year-round programming until they graduate from high school and go on to postsecondary education or employment. FLY currently serves 45 youth who have made a commitment, with their families, to participate in the program from age 8. Prospective students are recruited from Birney Elementary, a local school, or from referrals from current participants. Through its programs, FLY hopes to help at-risk young people graduate from high school and make a successful transition to work or higher education.

Metro TeenAIDS (MTA) is a community health organization dedicated to preventing the spread of HIV/AIDS and is the only HIV/AIDS organization in the Washington, D.C., metropolitan area that focuses its entire prevention, education, and treatment efforts on youth. Since its founding in 1988 by a group of physicians, educators, and citizens, MTA has provided services to more than 160,000 youth and their families. MTA educates young people and their communities with the goal of promoting responsible decision-making regarding sexual behavior and health. This includes providing HIV information and prevention strategies to youth, as well as supplying information on care. MTA provides testing and prevention materials, as well as counseling and treatment for infected persons. Finally, MTA conducts advocacy and outreach by mobilizing youth to educate policymakers and funders and by pushing for youth-friendly reproductive health services in local schools and other nonmedical settings. While MTA has several programs with distinct but complementary objectives, its overarching goals are to decrease the prevalence of HIV/AIDS among young people in Washington, D.C., and connect youth affected by the disease with high-quality care.

Urban Alliance (UA) is a youth development organization that focuses on providing high school seniors from under-resourced areas with the experiences and mentoring necessary to make a successful transition after high school graduation. Since its founding in 1996, UA has served 1,200 students, with a current capacity to reach 250 students a year. At the core of UA's

Exhibit 3. EOR Agency Summary Characteristics

	Facilitating Leadership in Youth	Metro TeenAIDS	Urban Alliance	Youth Power Center
Purpose	Provide out-of-school-time programming in academic and college preparatory tutoring; educational advocacy; internship placement and job skills training	Through education, support, and advocacy, work to prevent the spread of HIV, promote responsible decisionmaking, and improve the quality of life for young people infected with, or affected by, HIV/AIDS	Empower under-resourced youth to aspire, work, and succeed through paid internships, formal training, and mentoring	Provide youth with the environment needed to equip them with the skills, training, and resources necessary to compete successfully in society, through a job-training program, tutoring, and mentoring
Core program areas	Mentoring: tutoring, educational advocacy, arts education, college preparation, and job skills training Youth leadership: youth council, activism training, peer outreach	Outreach: Street Outreach, HIV 101, peer education and youth leadership development, Freestyle Youth Center Public policy and advocacy School services: Making Proud Choices!, VYBE Clubs Clinical services: counseling and testing, care advocacy, Family Center Social marketing	High school internship program; alumni services	After-school program for middle school and high school youth Out-of-school (disconnected) youth workforce development Championing Our Students program: mentoring, support, and collaboration
Target population	Youth age 8–24 who reside primarily in or around the Barry Farm Public Housing Development or the Congress Heights neighborhood in Ward 8	Youth age 13–24 who live in Wards 5, 6, 7, and 8 Freestyle: for interested youth age 13–24 Making Proud Choices!: public school 7th graders VYBE: 6th–8th graders HIV/STI testing and care advocacy: youth age 13–24	D.C. public and charter school seniors who are eligible for a half-day schedule, Baltimore students in two eligible schools, and alumni of the program	Middle and high school students who live in Wards 7 and 8 and out-of-school youth age 12–24
Youth served (2008–09 program year)	Core services: 45 youth throughout the year (these same students take part in the different programmatic activities) Peer outreach: 200	HIV testing: 983 HIV 101s: 2,773 Street Outreach: 10,050 Making Proud Choices!: 2,088 Freestyle: 123 Peer education: 42	High school internship program: 161 Alumni services: 100	After-school program: 120 Out-of-school youth: 20 Championing Our Students: 6 (summer 2009)
Budget (2009)	$385,000	$2.3 million	$1.9 million	$620,000
Staffing (2008–09)	Full-time staff: 3 Part-time staff: 2 Full-time volunteers (e.g., AmeriCorps): 2 Part-time volunteers: 60	Full-time staff: 16 Part-time staff: 49 Full-time volunteers (e.g., AmeriCorps): 1 Part-time volunteers: 23	Full-time staff: 11 Part-time staff: 3 Full-time volunteers (e.g., AmeriCorps): 0 Part-time volunteers: 150	Full-time staff: 3 Part-time staff: 3 Full-time volunteers (e.g., AmeriCorps): 7 Part-time volunteers: 22

services is a 10-month paid internship program. UA requires all students to participate in a paid three-week pre-internship training intended to familiarize students with résumé writing, interviewing, and other essential job skills. The program director then matches students who complete the training with a paid internship at a participating employer. Students work 12 hours a week while attending their senior year of high school. To support the students' transition into the workplace, they are assigned a program coordinator (akin to a case manager) and a job mentor (an employee identified by the job partner). Together, program coordinators and job mentors provide the students with support, feedback, and guidance. In addition to their internship, students attend weekly workshops on such job- and life-readiness topics as conflict resolution, goal setting, professional writing, and healthy behaviors. Students also learn to budget and build credit, and UA offers them the chance to start a matched savings account.

Youth Power Center (YPC), formerly known as the Good Samaritan Foundation, is a nonprofit serving youth in southeast Washington, D.C. Founded by a group of Washington Redskin football players in 1993, YPC started as a charity organization distributing food and clothing to the needy in Southeast. These experiences contributed to the organization's decision to expand its focus to support youth development needs for high school–age youth. YPC seeks to equip young people with the skills, training, and resources they need to successfully complete high school and advanced education and to prepare for the workforce. YPC has three programs: after-school education support for junior and senior high youth, workforce development for disconnected youth, and a mentoring program in law, sports, academics, and socioeconomic issues.

The EOR Initiative: What Happened and Why

This section synthesizes findings about what happened during the EOR Initiative and our analysis of key factors that are likely to have contributed to how agencies experienced and progressed throughout the term of the initiative. We highlight four findings related to the perceived value of the technical assistance offered, what agencies accomplished and how these experiences varied, how EOR helped agencies to leverage additional resources, and preliminary thoughts on sustainability efforts. Following this, we articulate three key factors that we believe ultimately explain, at least in part, agency progress and experience with evaluation. These factors are intended to be illustrative of specific EOR agency experiences as well as instructive to other community-based organizations throughout the District and beyond.

Findings

1. Agency directors uniformly cited the intensive technical assistance component as the principal driver of the evaluation capacity experienced by their agencies since the launch of this initiative. Evaluation specialists valued the peer-to-peer learning opportunities facilitated through monthly meetings and having a flexible and adaptable approach to the technical assistance program.

A unique feature of the East of the River Initiative was its emphasis on long-term technical assistance designed to help nonprofits better identify, measure, and communicate the effectiveness of their community-based interventions. The EOR intensive technical assistance component included two years of funding earmarked for an additional full-time staff member along with regular, ongoing technical assistance to individual agencies and facilitated peer learning among participating agencies provided by the Urban Institute. The World Bank Group also funded the Georgetown University Center for Continuing Studies' Center for Social Impact Communication. The Center provided communications consulting to the four selected youth nonprofits and helped each group develop a communications plan.[4] Community IT Innovators assessed each organization's information management system.

Throughout the initiative, agency directors spoke of the importance of the long-term technical assistance and how essential it has been to their agency's progress. This broader focus enabled some agencies to go beyond thinking in monthly or quarterly funder reporting requirements (which in many cases only permitted them to track attendance or basic outputs) to identifying the information that would be strategically important to the organization one to two years down the road. This longer-term thinking also forced the agencies to consider what was needed to set a plan in place to accomplish such reporting.

For example, Urban Alliance decided to focus on long-term tracking of youth employment outcomes. The Metro TeenAIDS director suggested that the long-range focus began a cultural shift within the organization—first making a commitment to long-term evaluation, but later translating into recognition that evaluation skills need to be cultivated among all staff. Several agency directors spoke about the progress made during the initiative in their ability to quantify what they do and ultimately better communicate a return on investment through reports, proposals, and presentations to their boards or other constituencies.

Evaluation specialists stated that, while they valued the one-on-one technical assistance with the Urban Institute team, they particularly appreciated the opportunity to engage with their agency peers through the monthly meetings. Typically at the start of each meeting, evaluation specialists would provide a progress report including highlights of key issues or challenges encountered. This served as an opportunity for other evaluation specialists to offer advice, share similar experiences, and jointly problem-solve. During these sessions, evaluation specialists often helped their peers connect to new information or resources in the community. At one meeting, an evaluation specialist spoke about purchasing and setting up third-party software for tracking outcomes—something another organization had recently undergone. One evaluation specialist was able to give the other advice on how to best take advantage of the new system.

Partway through the initiative, the evaluation specialists expressed interest in reassessing and further refining the objectives they were expected to achieve. This reevaluation coincided with a transition in the UI team caused by the departure of the lead technical assistance staff member from the Institute. In response, the new UI technical assistance team and the evaluation specialists developed and refined a range of activities, from informal monthly reporting on activities in which they were engaged, to constructing an evaluation history of the organization, to developing a long-range evaluation plan (expected to include a summary of goals and objectives, a logic model, data collection strategies, a timeline, and documentation regarding how each task would be accomplished and by whom). Some activities—for example, creating a program-wide logic model—were always part of the design of the EOR Initiative. But the Urban Institute team made other components more explicit and detailed—for example, asking the agencies to write a step-by-step description of the agencies' plans for data collection. This experience serves as a lesson to evaluation consultants and other grant makers, suggesting the importance of finding the right balance between a flexible approach and a more structured one that details specific guidelines about what or how things should be done. This is likely more of an art than a science.

2. Based on their initial capacities and experience, agencies demonstrated varied degrees of progress in conceptualizing, managing, and implementing internally defined evaluation strategies.

The technical assistance offered through this initiative was designed to help meet the needs of agencies with different levels of capacity and past experience in evaluation. For some, EOR helped provide a more coherent structure or organization to ongoing, but perhaps uncoordinated, evaluation strategies. For others, EOR helped fill gaps in particular areas, such as helping design a data collection instrument, develop an analysis plan to interpret data, or compile data analysis into a report. And for others, EOR helped focus attention on the role of evaluation and the importance of being able to quantify program successes beyond stories or anecdotes.

Put another way, agencies approached the start of this initiative at different places along the experience continuum of evaluation and thus had different expectations from the start about what they hoped to achieve. A review of agency applications submitted in January 2007, in particular of how they planned to use the evaluation specialist, illustrates this point.

- Metro TeenAIDS: "Naturally the new employee will focus primarily on the East of the River Initiative. Because our current systems are fairly stable, we feel confident that the new employee would be able to do just that. We see this new project as a major endeavor for the organization so we envision that she or he will function as a member of the management team. If time permits, we would like the employee to participate in programmatic meetings and trainings. We believe that the presence of this new employee will raise the 'evaluation consciousness' of the entire staff. Ideally the employee would help to expand the evaluation capacity of the senior staff, which will reduce our reliance on outside evaluators."

- "Urban Alliance's expectations of this initiative are to benefit from the identification of better techniques and tools for evaluating our impact on students enrolled in our program. Particularly we would like to broaden our range of data collection and measurement to provide a more complete picture of youth outcomes. Currently, our outcomes are limited to work skill ratings, high school graduation, and college enrollment. Broadening our measurement of outcomes will help us to better structure new areas of programming, as well as tell our story to the community."
- Facilitating Leadership for Youth: "If funding were available, [this] would allow FLY to positively engage youth in the redevelopment process. Youth have been left almost entirely out of all serious decision-making within New Communities . . . The organizer would work with FLY's teen staff to coordinate and facilitate a formal youth decisionmaking body."
- Youth Power Center "envisions utilizing the new staff person to lead, with direction from the executive director, the overall implementation of the strategic resource development plan; to supervise the day-to-day operations of the AmeriCorps/VISTA volunteers; and assist in the implementation of all recommendations that emerged from the branding process that involved board members, staff, youth in our program, contributors, volunteers, and friends and supporters."

Although the overall structure of technical assistance offered to each agency was uniform, individual needs and agency experiences called for more tailored assistance. Because of varying levels of emphasis and effort placed on evaluation tasks, among other factors, agencies reached the end of this initiative in different places. While all agencies are currently able to support stories of their impact with anecdotal evidence, more time is needed to effectively document these stories through the use of data.

Exhibit 4 summarizes the progress made by each agency on key evaluation activities. For example, all agencies were able to identify a mission statement, objectives, target audience, and specific indicators for which they intended to collect

Exhibit 4. Agency Experiences with Evaluation during EOR

	FLY	MTA	UA	YPC
Established overall schedule for evaluation	X	X	X	
Identified each program's mission, objectives, and clients	X	X	X	X
Identified outcomes for each program	X	X	X	X
Selected specific indicators to measure outcomes	X	X	X	X
Developed survey, test, or ratings instrument		X	X	
Created procedures for collecting and analyzing				
data from tests or ratings by trained observers		X	X	
close-ended surveys or qualitative interviews		X	X	X
administrative data (e.g., school attendance)	X	X	X	X
Collected outcome data from test, surveys, or administrative sources	X	X	X	X
Analyzed outcome data		X	X	
Compared outcome data to benchmarks				
Produced report of findings		X		
Used outcome information to improve services			X	
Used outcome information to improve fundraising	X	X	X	X
Used outcome information to improve community relations	X	X		

outcomes. However, we see more differences in how successful agencies were in implementation, particularly in analysis and reporting activities. The individual case studies in the next sections discuss these experiences in considerably more depth, including the specific context or conditions that may have contributed to or hindered progress to date.

3. Experiences from the EOR Initiative helped participating agencies leverage additional resources in support of programmatic efforts.

All agencies successfully used the EOR Initiative in one way or another to leverage additional support for their programs. This usually occurred in a grant-making context, whereby agencies were more able to effectively communicate the success of their efforts in the language of evaluation, such as by linking proposed program strategies or resource requests to intended outcomes and by detailing manageable and realistic evaluation plans or protocols. As a result, agencies credit the EOR Initiative with helping them develop proposal requests for additional staff resources to implement program operations or to support evaluation plans. Detailed below are some agency-specific examples.

- Urban Alliance used the EOR Initiative to leverage another one-time capacity grant to help establish an alumni tracking database. This enabled UA to increase its list of alumni contacts from 20 to 850.
- The Youth Power Center was recently awarded two grants from the Corporation for National and Community Service that provide 15 AmeriCorps members to support program activities. The YPC executive director points to EOR technical assistance as instrumental in strengthening agency grant application requests, ultimately making these awards possible.
- As a result of work in the EOR Initiative, FLY saw a need for a software program that could track and manage the outcome information helpful for assessing their programs. FLY put in a grant application to SalesForce and was awarded a free license to boost its technological capacity. Additionally, because of improved documentation of its program models and outcomes, FLY was awarded two AmeriCorps VISTA positions in 2009 to work on evaluation and fundraising.
- Metro TeenAIDS used four interns from Georgetown University's International Health Program to input and analyze two years of data records for its Street Outreach program. Before assistance from these interns, data from hundreds of outreach cards could not be systematically reviewed or analyzed by staff.

4. How well specific evaluation strategies and experiences will become fully integrated and sustained by EOR agencies is expected to vary. Some degree of follow-up after the conclusion of the initiative will be needed to confirm or deny this observation.

In applying to participate in the EOR Initiative, the World Bank Group asked the nonprofit agencies to project not just the program evaluation work they intended to accomplish during the initiative, but also what they expected their capacity and activities to be in subsequent years. As with the design and implementation of actionable evaluation strategies during the EOR Initiative, medium- and long-term sustainability efforts may vary from agency to agency.

A sustained commitment to evaluation requires buy-in from all levels of an agency, including a coherent approach, well-documented data-collection strategies and procedures, and a plan for integrating findings into management decisionmaking and program operations. Underscoring these factors are the necessary human and financial resources, including appropriate skills and agency supports to enable the evaluation function to coexist among competing demands for programming, fundraising, and communications. Raising funds earmarked specifically for evaluation is a key step to ensuring sustainability. Two of the agencies have begun to ensure sustainability of the evaluation work they began under the EOR Initiative by including a small budget for evaluation in all future grant submissions.

Summarized below are agency-specific plans to sustain either the evaluation specialist position supported under the EOR Initiative or evaluation work without the evaluation specialist beyond the initiative.

- MTA is committed to maintaining a staff position focused solely on evaluation beyond the term of the EOR grant. To support this position, it has plans to include evaluation in all new funding requests. Moving forward, MTA hopes to develop a number of additional assessments for its peer education and youth leadership development programs, as well as a school staff assessment to better understand how program activities may or may not be influencing youth outcomes. MTA will continue to analyze existing program data and has plans to develop issue briefs for outreach and other program areas.
- Beginning in fall 2009, FLY's director of programs will provide 40 percent of her time to evaluation work and will be assisted by an AmeriCorps/VISTA member. Key evaluation tasks the organization hopes to conduct in the future include comprehensive, quarterly reporting on youth and surveying youth and families about their experiences at FLY.
- Urban Alliance has stated its commitment to implementing the proposed evaluation plan. The evaluation specialist intends to remain at UA, and a recent decision with organizational management will streamline this position to focus 50 percent on evaluation with remaining time devoted to special projects. Before this decision, the evaluation specialist often split his time between three or four activities, one of which was evaluation. Evaluation activities for the coming year will focus on survey administration and analysis of data for current program participants as well as alumni.
- Despite its commitment to evaluation, YPC does not have the resources to keep the evaluation specialist beyond the term of the initiative (August 2009). The evaluation specialist has been working closely with the program director, who is expected to assume responsibilities for evaluation in the future. The program director will be supported by AmeriCorps and VISTA volunteers who will assist with data collection and entry. The agency projects that in sum the program director will spend half his time on evaluation activities. YPC plans to begin to include an evaluation component and budget request in each prospective grant proposal.

The sustainability of program evaluation efforts are likely to vary across the four nonprofit agencies. One proxy measure for whether program evaluation will prove sustainable is the staff time agencies will devote to this work. Organizations with a greater commitment to maintaining an evaluation specialist position may be more likely to achieve success. As described above, the four EOR agencies range in their projections of the staff time devoted to evaluation from 40 to 80 percent of a full-time-equivalent employee. But projected staff time is not the only predictor of evaluation sustainability. Other factors, including staff qualifications and program stability, will affect the sustainability of evaluation work.

Key Factors Affecting the Quality of Evaluation Efforts and Experience

The following discussion takes up critical issues likely to influence high-quality evaluation efforts and sustainability. These factors explain—at least in part—how well the four nonprofit agencies succeeded in constructing and implementing a plan for program evaluation during the EOR Initiative. We explore these factors, relating them to the experiences of the EOR agencies, and expect them to be instructive to other community-based organizations throughout the District and beyond.

1. Resources Available and Applied

Staff Commitment

Understanding that the evaluation function in many nonprofits is often subordinate to delivering the program mission to serve a target population or to secure funds to act on this mission, the World Bank Group designed the EOR demonstration with a goal of elevating the importance of evaluation by alleviating the burden on agencies to have to fundraise for the evaluation function. Thus, each agency selected to participate was given resources designed to fully support an evaluation specialist for two years under the grant.

The World Bank Group's objective that the evaluation specialist funded through the initiative would work full time on evaluation activities was not realized in any of the participating agencies. In all cases, evaluation specialists' time was diverted to other fundraising or program development priorities.

- The evaluation specialist at Urban Alliance was charged with helping establish program operations for a new site in Baltimore as well as helping with day-to-day tasks as needed.
- The evaluation specialist at Youth Power Center was often diverted to fundraising and grant-writing activities.
- The evaluation specialist at Metro TeenAIDS was occasionally diverted to program operations or volunteer management activities; however, his experience in these tasks was often informed by program data or other evaluation-related information.
- The evaluation specialist at FLY, working beside the executive director and supported by one or two other staff, was often diverted to other day-to-day program operations or management challenges facing the organization.

These types of scenarios occur often in the nonprofit sector, where organizational resources are often stretched thin and employees wear multiple hats. Although all participating agencies clearly understood and supported the evaluation function as specified under the grant, the environments in which they operated clearly created pressure to take evaluation specialists off task. Some executive directors argued that the additional tasks, such as grant writing, were integrated and wholly related to the role of the evaluation specialists, while all the evaluation specialists agreed that the original expectation to devote 100 percent of their time to evaluation tasks was unrealistic. This is an important consideration for the World Bank Group and other funders considering similar investments to accept or reject and under what conditions.

Metro TeenAIDS adhered to the original commitment better than the other agencies. This is likely attributable to the established commitment to and practice of evaluation within the agency before the EOR Initiative, as well as to a well-established staffing structure with clearly delineated roles and responsibilities. In contrast, FLY and YPC are very small organizations with three to four full-time staff. In nonprofits of this size, staff members are often expected to take on diverse responsibilities and, therefore, have less specialized roles. Perhaps, in retrospect, the structure of small organizations made it more challenging for the evaluation specialists in these agencies to focus exclusively on evaluation tasks. Exhibit 5 summarizes the resources available in each organization.

However, as none of the agencies have to date fully executed their evaluation plan, it is clear that more attention to evaluation is necessary, despite various conditions and competing demands present in each agency.

Staff Qualifications and Position in the Agency

Individual qualifications, including prior experience with evaluation and disposition toward the task, are important factors in developing and effectively implementing quality evaluation efforts. In addition, particularly for larger organizations, the individual's position and ready access to other decisionmaking staff plays a critical role. Exhibit 5 summarizes the backgrounds of the four evaluation specialists.

The evaluation specialist position at Urban Alliance embodied these qualifications and access most completely among peer agencies. The specialist had recently completed a master's degree in education policy and was eager to apply his new skills on the job. He also had access to senior management and thus was able to keep the evaluation function at the forefront of the agency's overall strategic planning efforts, even as other agency priorities threatened to divert his attention to other tasks.

At MTA, the evaluation specialist initially hired to the position was a recent graduate. While not formally trained in evaluation techniques, she brought a high level of energy and commitment to the task, and her efforts toward evaluation were strongly supported by the executive director. However, she was moved from this role to assist in strategic planning efforts at the agency, and one of the outreach/volunteer coordinators was appointed to this position. The second evaluation specialist brought equally high levels of enthusiasm and commitment to the task, while working hard to integrate evaluation data into program planning and decisionmaking. Neither specialist had formal evaluation training, but both were quick learners and able to put together a more integrated strategy for evaluation within the agency.

Exhibit 5. Assessment of Resources Available and Applied within EOR Agencies (Factor 1)

	FLY	MTA	UA	YPC
Staff commitment				
Small nonprofit agency (fewer than 5 full-time employees)	X			X
Short-term staff or volunteers	Many year-long volunteers	Many one-time volunteers, AmeriCorps	Many year-long volunteers	Volunteer office staff; AmeriCorps and VISTA
Share of evaluation specialist's time spent on evaluation	Low	High	Medium	Medium
Staff qualifications and position				
Evaluation specialist had advanced training or experience with evaluation			X	X
Evaluation specialist had prior experience within agency	X	X	X	
Turnover and continuity				
Evaluation staff turnover during initiative	X	X		
EOR evaluation specialist will continue in similar capacity		X	X	
Agency projections of staff commitment after EOR to evaluation (share of one full-time employee)	40%	80%	50%	50%
Evidence of a culture of inquiry and shared problem-solving		X	X	

At FLY, the evaluation specialist initially hired to the position held a master's of public administration degree with a concentration in nonprofit management. She brought a few years of experience working in nonprofit environments on myriad tasks, including program evaluation and organizational assessments. This position turned over about midway through the grant. The new evaluation specialist was a recent graduate, but she had been working in various capacities at FLY since 2006. Initially an executive assistant, she was promoted to communications and evaluation coordinator.

The evaluation specialist at YPC brought three years of monitoring and evaluation experience to his new role, supported by a dozen years in program planning. As demonstrated by some early grant applications, he had a solid foundation for understanding core principles of outcomes management and evaluation.

The evaluation specialists at FLY and YPC also worked very closely with their executive directors. Even with such access, however, evaluation efforts were often set aside in pursuit of other, more pressing, day-to-day needs of the agency. In fact, FLY's executive director mentioned that the reality of the organization being short-staffed made it unrealistic to undertake some of the evaluation tasks recommended by the UI team. This suggests that, at least in the case of smaller organizations, access to agency decision-makers by itself is not sufficient for focusing the organization's efforts on a developing a dedicated evaluation function.

Turnover and Continuity

Staff turnover is common in nonprofit organizations, and the ability to attract and retain talented staff is a constant challenge. Turnover in the evaluation position occurred during the term of the EOR grant in two of the four agencies, FLY and MTA. At MTA, the potential for disruption was minimized because the original evaluation specialist stayed on at the agency in a new role and helped facilitate a smooth transition to her successor. At FLY, however, the original evaluation specialist left the agency entirely, and her replacement was forced to brief herself on the organization's history of evaluation and the current strategies in place.

In terms of the ongoing sustainability of progress made during the EOR Initiative, one measure is whether the evaluation specialists are likely to be retained by their agencies after the EOR funding ends. The EOR evaluation specialists at FLY, MTA, and Urban Alliance are expected to continue on beyond the completion of the grant. As noted earlier, evaluation functions at YPC will be assumed by the program director, with support from AmeriCorps and VISTA volunteers. The program director expects to devote 50 percent of his time to evaluation. While the program director is knowledgeable about program activities and evaluation, we have some concerns about his ability to dedicate sufficient time to evaluation tasks—both as new programs are getting off the ground in the fall, and with plans to implement new data collection activities, including plans to introduce a new software system.

Concerns about continuity can be overcome in cases where agencies have worked to prepare detailed documentation of data collection procedures, including clear timelines of what needs to occur when and instruction about how to administer various procedures and input and analyze information. MTA produced this level of detail as part of its evaluation plan, but it has room to further improve efforts to sustain evaluation activities by developing standardized data templates and reporting formats.

Ultimately, the best way to ensure continuity is to promote an appreciation of evaluation at all levels of the agency. This involves cultivating a culture of inquiry and shared problem-solving. One way to accomplish this might be to hold quarterly meetings or a semiannual retreat with all staff to review program data, discuss implications, and decide whether any new strategies may be warranted. If this happens routinely in an organization, evaluation will become more integrated throughout the program cycle, as well as possibly serve as a catalyst for new programming or strategic directions for an agency.

Finally, it is important to note that the UI team underwent some staff turnover about one year into the technical assistance program, and to acknowledge that this may have also slowed the progress made by the agencies. The lead technical assistance provider on the UI team left the Institute in April 2008. Although he was replaced by two experienced UI staff members, some time was lost in the transition. In particular, there was a disruption in the monthly meetings with the evaluation specialists during the transition period.

As noted earlier in this section, the transition provided an opportunity to reassess the progress that had been made thus far in the technical assistance effort. As a result, the new UI technical assistance team and the evaluation specialists jointly developed and refined a range of activities for the remainder of the EOR Initiative. While these refinements ultimately resulted in activities that were better tailored to the needs and capacities of the agencies, some time was lost in rethinking the program at this stage. Exhibit 5 summarizes these findings for each of the four agencies.

2. *Organizational Culture and Readiness*

A healthy predisposition toward evaluation begins with buy-in from organizational leadership. If the executive director or board of directors views evaluation merely as an accounting task to guarantee continued receipt of program funding or as something to do only when the agency has some discretionary resources, then evaluation will be relegated as subordinate to anything else the agency seeks to accomplish. Regardless of how one feels about the importance of evaluation or how eloquently agency staff talk about their commitment to mission and serving the needs of whatever target population, the increasing demand for evaluation information and accountability from funders, government, and the public suggests that undertaking evaluation activities is essential to organizational survival. Put simply, funders are demanding that grantees be able to identify intended outcomes and provide data to support progress in achieving these outcomes. Even if funders still need to develop internal capacity to effectively use such information, they too are starting to move toward doing so, and will likely have more resources to get up to speed sooner than many nonprofits.

Some of an organization's readiness to approach evaluation activities comes from past experience, either what the executive director brings to the agency or what the agency has built internally. Organizations that have secured medium-sized to large grants from the federal government or national foundations will likely have been forced to respond sooner than organizations resourced through private donors or small community foundations that may not yet have formalized reporting requirements beyond financial accounting or simple reports of number of participants served.

MTA Example

As recently as 2003, Metro TeenAIDS had no internal evaluation staff. However, in 2003–04, MTA received a federal grant to implement the Making Proud Choices! curriculum in local public schools. One of the grant conditions required the agency to have a principal investigator with a Ph.D. and appropriate experience and credentials to evaluate this five-year effort. Lacking such internal capacity, MTA subcontracted with Shattuck and Associates to help develop and administer the pre- and post-test survey of youth participants. Staff working with the external evaluator helped troubleshoot issues related to obtaining parental consent, improving response rates, and reviewing analysis. These experiences helped forge an understanding of key evaluation principles at MTA. Over time, MTA contracted with these external evaluators to help design additional evaluation tools and protocols, many of which are now administered by staff internally.

FLY Example

Until involvement with EOR led to more formal and organization-wide strategies for evaluation, FLY relied on input and output measures that reflected only program reporting requirements. Catering to funder needs not only led to limited and disjointed data collected, but also data that existed in different formats. There was no consistency in the frequency of report completion since different funders required information monthly or a few times a year.

Organizational readiness to effectively embrace evaluation at its most mature stage occurs when the evaluation function is fully integrated into program management and decisionmaking from the top to bottom of the organization. The evaluation function should not merely be ad hoc or an afterthought to the core work of the agency. Evaluation should be used at all levels of decision-making from planning the direction of the agency's mission and program strategy; to helping inform how the agency knows it is being successful; to redirecting resources when data suggest that programs are failing, underperforming, or simply under-resourced; to communicating its value to the larger community. Exhibit 6 summarizes the EOR agencies' previous experiences and readiness to implement a strategy for program evaluation.

3. Program Structure and Stability

A reasonably stable and well-defined program structure is a critical factor for supporting effective program evaluation. This means that the agency has a clearly articulated theory of change or logic model, detailing how program inputs and activities are expected to lead to specific outputs or products and ultimately outcomes or results on behalf of the constituencies served. It also means that the program activities and target populations are reasonably well-defined and not shifting too often to pursue the whim of a donor or new funding stream. We refer to this as program integrity. Exhibit 7 records where the four EOR nonprofit organizations fall in their program stability.

There is a temptation, particularly among smaller, less-resourced agencies, to "follow the funding" and thus accommodate the interests of the funding source at the expense of program stability or continuity of activities. Usually this happens in small ways with little compromises, but over time this approach can have major consequences for the viability of the agency and its ability to communicate its purpose. This is not to say that over time an agency might discover a gap or decide to extend its mission to serve a new or expanded target population. The key is in thinking strategically and being proactive about mission, rather than being reactive to simply stay afloat.

Exhibit 6. Assessment of Organizational Culture and Readiness within EOR Agencies (Factor 2)

	FLY	MTA	UA	YPC
Evaluation specialist held leadership position within agency[a]	X	X	X	X
Significant evaluation process in place before EOR		X	X	
Existing data collection instruments before EOR		X	X	
Collected administrative data before EOR	X		X	X
Outcome measurement software before EOR		X	X	

[a]In larger nonprofit agencies, this criterion is critical for raising the visibility of evaluation within the organization. Access to leadership in small nonprofit agencies occurs more naturally; this is different from the kind of leadership needed to elevate evaluation in larger organizations.

Exhibit 7. Assessment of Program Structure and Stability within EOR Agencies (Factor 3)

	FLY	MTA	UA	YPC
Program stability (changes in program focus or activities)	Medium-low	Medium to high	High	Emerging
Program disruption due to change in location	X			X

"A Place to Call Home"

A critical element of program stability for the EOR nonprofit agencies was having a dedicated space or location where program services were delivered. This space can be owned by the agency or borrowed from another community-based provider. To varying degrees throughout this initiative, each participating agency experienced disruption in the accessibility of program space. This issue was most prominent for the Youth Power Center, which acquired a 12,000-foot building on Martin Luther King Jr. Avenue SE around the time it submitted its application to the World Bank Group. Because of various permitting issues, delays in renovations, difficulties raising funds, and other work stoppages, this space remained unfinished and unoccupied for the remainder of the initiative. Absent a place to meet with and serve youth in the community, YPC struggled early in the initiative to recruit and retain youth to its programs. Over time, program staff sought other solutions, including partnering with schools in the community, and thus were able to offer services to more than twice as many youth during the second year of the initiative than in the first.

Later in the grant cycle, FLY learned that its expiring lease would not be renewed. FLY has since found a new location to occupy, but not without disruption to staff and youth programming. Program operations were significantly reduced at the end of the 2008–09 school year while FLY transitioned. Urban Alliance was also required to change locations during the initiative, though this move did not significantly interrupt its programming. Similarly, MTA occupied two properties on Pennsylvania Avenue SE in Capitol Hill: an outreach/drop-in center and a program office. The outreach/drop-in center recently underwent renovations, which required the need to consolidate activities temporarily at a single location.

Programs that have been in place for a number of years or school cycles will more readily be in a position to define outcomes, identify data collection procedures, and work through challenges to obtaining certain kinds of information (e.g., official school records data, police or court records, etc.). Ideally, strategies will become more routine and the datasets richer to enable better comparisons, observations of trends, and target setting.

In the next section, we revisit the core findings and factors in the context of each agency's experience. These case studies provide reasonably detailed program descriptions, document agency experience with evaluation both before and during the EOR Initiative, and conclude with our assessment of progress to date—including a summary of strengths, challenges, and next steps.

Facilitating Leadership in Youth Case Study

Facilitating Leadership in Youth, a small nonprofit located in southeast Washington, D.C., works with youth age 8 to 24 to help them develop their artistic talents, achieve their educational goals, and expand their leadership roles. The organization, incorporated in 2002, supports youth through a comprehensive, long-term youth development approach that engages the youth in year-round programming, until they graduate high school and go on to post-secondary education or employment. During the project period, FLY expanded services to include alumni that are attending college. FLY serves 45 youth who have made a commitment, with their families, to participate in the program from grades 4 or 5.

Prospective students are accepted from Birney Elementary, a local school, and from referrals from current participants. Birney Elementary draws students from the Barry Farm public housing development and the surrounding neighborhood, located between historic Anacostia and St. Elizabeth's Hospital on the north and south, and U.S. Highway 295 and Martin Luther King Jr. Avenue on the east and west. This community is distressed, known for blight and poverty. High school graduation rates are among the lowest in the District, while rates of teen pregnancy and violent crime are among the highest.

Besides being the youngest of the four nonprofits participating in the East of the River Initiative, FLY has the smallest staff and budget. From 2007 through mid-June 2009, full-time staff included an executive director, a program coordinator, and a communications/evaluation coordinator. In addition, FLY had two part-time staff, serving as a director of program operations and a youth leadership program advisor. One AmeriCorps VISTA volunteer worked full time at FLY in a variety of roles during a portion of the EOR Initiative, although she has since left the organization. A team of several summer interns that have a volunteer history with the organization help with college preparation, communications and development, programming, and organizing youth.

Additionally, about 60 college-age volunteers make one-year commitments to FLY as mentors. Most of these mentors are students at American University. Mentors are screened during recruitment, mostly to assess whether they will be committed and fulfill their responsibilities to their mentee. FLY hosts a four-hour orientation retreat and a series of mandatory monthly mentor training sessions to equip volunteers with mentoring and youth development skills.

FLY's programming has several components, the most important of which is long-term individualized mentoring and tutoring. A full listing of FLY programs, frequency/duration, and targeted age groups is included in exhibit 8. Mentoring and tutoring runs concurrent to the school year and is designed to help participants reach their educational potential. FLY requires all youth who choose to engage in its activities to participate in the mentoring and tutoring program. Each FLY youth is paired with a volunteer mentor. This pair meets at least twice a week Monday through Thursday after school or on Saturday afternoons for two-hour sessions. For the 2008–09 school year, youth attended these sessions 95 percent of the time.

When FLY youth turn 13 years old, they can participate in a program called Dollars for Scholars, designed to teach them how to apply to colleges, research career options, and apply for scholarships. The end goal is that participants

Exhibit 8. FLY Programs, Frequency, and Ages Served

Program name	Frequency/duration	Ages served
Mentoring and Tutoring	Twice a week for youth age 8–12 and three times a week for youth age 13–18, for two hours, during school year.	8–18
Dollars for Scholars	Individual coaching and workshops, year round	13 and up
Young Women's Program	Every other week, year round	13 and up (female)
Young Men's Program	Every other week, year round	13 and up (male)
Day Camp	Summer only	8–13
Internship Program	Eight weeks, summer only	14–18
BLAST (Youth Council)	Every two weeks after school and weekly in summer	12–21

choose the education best suited to their needs after graduating from high school. Dollars for Scholars runs year round and is led by an experienced intern who has a history of service with the organization. Fifteen students attended the program during the 2008–09 school year, which consists of weekly workshops on college and career search, scholarship and admissions application essay writing, ACT/SAT preparation, and individualized coaching for college selection and academic and career planning. In addition, FLY pairs youth with a volunteer mentor for college applications and financial aid. For the 2008–09 school year, six of seven high school seniors who participated graduated from high school and entered college, most with scholarships. The seventh senior is completing work to graduate during summer 2009.

Like Dollars for Scholars, the Young Women's and Men's Program is a program for youth age 13 and older. The program, which is run year round by college-age and young professional mentors, consists of gender-specific mentoring in a group setting that seeks to provide a safe space for teenagers to discuss important social, personal, and health-related issues. Sessions take place once every two weeks and are usually structured around a group activity or field trip, with discussion before or afterward. Currently, FLY does not have a volunteer to lead the Men's Program, so this component will remain inactive until the position is filled.

During the summer, FLY runs two different activities: a camp for younger youth and an internship program for older youth in partnership with local businesses and organizations. The camp, held at American University's campus, incorporates educational instruction designed as fun activities. The summer internship program, for youth age 14 to 18, consists of eight weeks of internships, mentoring, and college preparatory classes during the afternoon or evening. The paid positions are provided through Washington, D.C.'s Summer Youth Employment Program.

The final component of FLY's programming, Building Leadership among Strong Teens (BLAST), refers to its idea of combining youth leadership with the other mentoring and educational components. BLAST acts as a youth council, holding meetings every two weeks throughout the year. BLAST participates in forming and must approve FLY's long-term plans, hiring decisions, and major budget changes. Youth also provide feedback on existing staff and programs.

Evaluation before the EOR Initiative

Before its involvement with the EOR Initiative, FLY did not have a formal system to measure its performance. Additionally, because of its small size, senior staff were heavily involved in supervising programs and fundraising, so little priority was placed on evaluation. Despite a lack of systematic evaluation procedures, FLY nevertheless collected report cards and testimonies from youth and recorded their school and program attendance, behavioral changes and incidents, and accomplishments. By design, FLY's programs are long-term, prolonged interactions between the organization and the youth it serves. Anecdotal and informal observation of youth progress allowed FLY to assess their development. This approach did not, however, permit FLY to systematically capture and quantify success.

In the few years before the EOR Initiative, FLY relied more on tracking program inputs and activities than the results of their efforts, partly because of lack of capacity, but also because many of FLY's youth had not yet graduated from the program. Some basic indicators that FLY collected at this time included the number of programming hours received by each youth, school and program attendance rates, the ratio of volunteers to youth, the number and dollar value of scholarships and awards won by youth, the number of youth attending non-D.C. public schools that better fit their needs, the number and percentage of high school seniors graduating within four years, and the number and percentage of youth advancing in grade level. FLY collected most of these measures in response to requirements imposed by funders, not because they were necessarily the best measures of program effectiveness. As a result of these external reporting requirements, most of FLY's data was held in different formats and not easily accessible for future use or comparison over time.

Evaluation during the EOR Initiative

As with the other organizations, FLY's work under the EOR Initiative first focused on program-specific evaluation processes and tools, then on developing an organization-wide evaluation plan to guide future efforts.

Early in the initiative, FLY created logic models about its various programs, and by June 2008, it had produced a separate model for each program in exhibit 8. For each program, a title describes the "motivating conditions and causes" that led FLY to create the program. For Dollars for Scholars, for example, the motivating condition and cause is "FLY youth accepted into college should have the ability to pay for college." After this overarching description of purpose, the programmatic logic models follow a basic formula, linking inputs, outputs, indicators, and outcomes together. For inputs, the models mention the number of staff and materials needed. Outcomes are separated into short term and long term, the former referring to those that can be observed within the first year of the program. An excerpt from one of the program logic models is presented in exhibit 9.

Another early project that FLY undertook with the help of the UI team was the analysis of data collected from youth leadership and action surveys of 533 neighborhood youth, about a quarter of whom had been arrested at some point in their lives. Some questions were open-ended, and some were based on scales asking respondents about their personal history of interaction with police and their perspectives on police harassment. The data—focused on youth perceptions of how police relate to young people in the District—were meant to be used by FLY to organize a campaign on police-community relations. FLY also created a report that summarized findings and made four recommendations for strengthening the "safety net for youth." A sample of some of the questions asked in the survey is presented in exhibit 10.

A significant challenge for FLY occurred in spring 2008 when the evaluation specialist hired at the start of the EOR Initiative left the organization. In response to this departure, FLY appointed someone within the organization to fill this role. Because of FLY's limited resources and staff, the replacement evaluation specialist had to divide her time between evaluation activities and her existing programmatic responsibilities. Competing demands on the evaluation specialist's time meant less effort was devoted to designing or implementing a robust evaluation design.

In summer 2008, FLY hired an experienced summer intern tasked with helping the evaluation

Exhibit 9. Excerpt of Logic Model for the Dollars for Scholars *Program*

Inputs *What resources do we have to work with?*	**Outputs** *What are the tangible results of our activities?*	**Indicators** *How will we measure our progress?*	**Short-term outcomes** *What changes do we expect to occur as a result of our program within the first year?*	**Long-term outcomes** *What changes do we expect over time?*
■ Dollars for Scholars consultant/coordinator ■ Dollars for Scholars assistant ■ Educational advocate	■ FLY youth age 13 and up are provided with year-round instruction, coaching, and mentoring 1–3 days a week ■ Youth are instructed in and coached throughout the college application and financial aid process	■ # of college applications submitted by each senior ■ # and % of college acceptances by each senior compared to rejections ■ # of college enrollees who graduate college	■ All FLY seniors will submit at least 5 college applications including both "safety" and "reach" schools ■ Participants will complete quality, highly competitive college applications	■ All FLY college enrollees will graduate college ■ Participants will complete at least 10 scholarship applications ■ At least 75% of FLY graduates who enroll in college will graduate college with little to no student loan debt

Exhibit 10. Sample Community Survey Questions

1. Rank the following issues in order of importance to you (1 = most important; 7 = least important)

______ Teen pregnancy
______ Quality public school education
______ Teen violence and teen safety (fighting, etc.)
______ HIV/AIDS
______ Youth employment opportunities
______ Interesting after-school programs for youth
______ Police harassment and abuse of D.C. teens

2. Do you think police abuse and harassment of D.C. youth is a problem? (circle one)

a. It's a BIG problem
b. It's a problem but NOT a big problem
c. It's not much of a problem
d. It's not a problem at all
e. Don't know/Not sure

3. In the past year, were you a victim of MPD abuse and/or harassment? (circle one)

(Yes) (No)
If you answered yes, briefly explain what happened:

Did you report the MPD officer(s) involved for abusive behavior or harassment? (circle one)
(Yes) (No)
Who did you report the complaint to? ______________________________

4. Do you know where to file a police complaint? (circle one)

(Yes) (No)

specialist collect data and design the program evaluation. It was at this time that FLY decided to record data using SalesForce software. To this end, FLY began compiling a comprehensive list of performance topics it was interested in tracking. By summer 2009, however, FLY had not yet completed this inventory or hired the assistance it needed to set up the SalesForce software. Additionally, FLY had to leave its space in January 2009 and could not fully occupy its new space for several months. FLY continued programming with just the neediest students, often at a local public library, with plans to resume programming at full strength after this transition period passed.

FLY began to draft an evaluation plan, which comprises four parts: a description of FLY's programming and neighborhood context; a description of FLY's history of program evaluation; a logic model linking FLY's inputs, outputs, and outcomes; and a discussion of planned data collection efforts and their timing. FLY's logic model describes the program's inputs, activities, outputs, and outcomes. Each factor includes considerable detail. For example, under program inputs, the model describes how many youth participate, as well as how many and what kind of personnel, materials, and facilities are necessary. Program activities are broken down into those needed for direct services, supports, and evaluation. Outputs focus solely on the outputs for direct services. The program outcomes section is split into initial, intermediate, and long-term outcomes.

FLY's goals for evaluation, as described in the plan, go beyond just obtaining information on the effectiveness of programs. The goals also include instructing current and future staff on data and document collection, as well as using the results of evaluation to assist in maintaining and leveraging funds from grants and other donors. FLY is interested in answering the following questions:

- Are FLY stakeholders (youth, families) satisfied with services?
- Are there ways in which FLY can realistically improve on services offered to clients?
- According to youth and families, is FLY making a significant impact and achieving outcomes?

Initially, FLY intended to design a satisfaction survey of participants and their parents, to be administered by the AmeriCorps/VISTA volunteer. The volunteer ended up leaving FLY, however, and staff determined that they no longer had the capacity to complete the survey at this time. As a result, FLY will conduct future program evaluation relying primarily on student report cards, school incidents and behavior reports, school and FLY attendance reports, and staff reporting. FLY did not design any new survey instruments during the course of the initiative.

Summary Assessment

Despite showing progress by creating detailed program logic models in the first year, and developing an evaluation plan in the second year, FLY was unable to implement evaluation activities during the EOR Initiative. FLY was particularly challenged by turnover in the evaluation function, limited number of staff, and funding cuts. Despite these challenges, FLY's program structure remained static, except for the addition of the Dollars for Scholars program and expanded edu-

Key Successes and Challenges

Successes

Developed detailed logic models for each program area

Synthesized survey data from a community-wide survey of youth-police relations

Challenges

Turnover in evaluation specialist position mid-way through grant

Division of staff attention between evaluation and other activities

Program instability (caused by agency relocation and unexpected cuts in funding) cational advocacy and mentoring services to FLY alumni attending college.

FLY successfully created detailed logic models about its various programs and began to develop an evaluation plan. This plan specifies that FLY will continue to collect outcome data available from an outside source, such as the students' schools. This plan includes a prospective timeline of activities through August 2010. FLY drafted an organizational logic model based on the individual program models developed earlier in the initiative. In time, FLY plans to use this model to guide evaluation efforts. Key evaluation tasks the organization hopes to conduct in the future include comprehensive quarterly reporting on youth and surveying youth and families about their experiences at FLY, to include online surveys.

More so than at the other agencies, FLY's evaluation specialist was pulled away from evaluation work to perform other programming and fundraising tasks. Because many of FLY's activities are new, in flux, or have been recently curtailed, much of the evaluation specialist's time was needed to attend to these issues. FLY expects that beginning in fall 2009, the director of programs will devote 40 percent of her time to evaluation work and will be assisted by an AmeriCorps/VISTA member. Two other sources of instability that were not unique to FLY—and which led to challenges among the other agencies that experienced them—were staff turnover and moving locations. FLY promoted one of its existing staff members to fill the vacant role of evaluation specialist halfway through the initiative. While she certainly was familiar with the details of FLY's programming, she had to train herself on the specifics of FLY's evaluation history and logistics. Further, evaluation work was disrupted for several months as FLY moved locations and was without a permanent space.

We offer a few suggestions to help FLY structure a manageable evaluation agenda for the future. First, FLY has done a good job in defining core evaluation activities in the plan already in progress. FLY was not, however, able to implement its program evaluation plan during the initiative. Given FLY's prolonged and intensive interaction with participating youth over many years, the Urban Institute team does not believe FLY necessarily needs to develop or support evaluation with the same level of intensity as some of the other organizations. Minimally, however, FLY needs to identify and document key outcomes for its participants to be accountable for the funding it does receive, and to demonstrate the impact of FLY's programs on youth to other stakeholders.

A condensed evaluation strategy built on a short survey of youth and their parents, limited administrative and program records, and a handful of qualitative interviews with youth should provide a good foundation for FLY as the organization seeks to grow. Given the close relationship between FLY and American University, FLY should explore opportunities to leverage free or low-cost assistance from student interns with experience or interest in evaluation activities.

Metro TeenAIDS Case Study

Metro TeenAIDS (MTA) is a community health organization dedicated to the prevention and treatment of HIV/AIDS among youth in Washington, D.C. Founded in 1988 by a group of physicians, educators, and citizens, MTA has served more than 160,000 youth in its over 20 years of existence.

MTA supports young people in the fight against HIV/AIDS through educating youth, promoting responsible decisionmaking, providing prevention and testing services, offering counseling and treatment for infected youth, and conducting advocacy and outreach. MTA categorizes its many specific programs and activities into six broad areas: outreach/community partnerships, public policy/advocacy, school services, clinical services, social marketing, and community capacity building.

The outreach/community partnerships area has the widest variety of activities. MTA Street Outreach staff and volunteers distribute safer sex materials and information about HIV and other sexually transmitted infections (STIs). MTA also operates Freestyle, an after-school, activity-based youth center that promotes HIV education and leadership. On a smaller scale, HIV 101 is an interactive one-hour program that teaches youth basic facts about HIV/AIDS. Finally, the peer education and youth leadership development component has youth go through rigorous training on how to talk to their peers about HIV, other STIs, and pregnancy.

The public policy/advocacy program supports policies advancing HIV prevention education and accessibility to reproductive health resources. The three main goals are to track the D.C. Department of Health's Youth and HIV Prevention Initiative Plan, to advocate for youth-friendly reproductive health services in schools and nonmedical settings, and to act as a watchdog for D.C. public and charter schools' provision of comprehensive sex education.

Two programs fall under the school services umbrella. Making Proud Choices! (MPC!) is a federally funded curriculum originally conducted in 10th grade D.C. public and charter school classrooms and now extended to 7th grade. This program provides information on prevention and risk-reduction skills. Similarly, MTA holds Visionary Youth Becoming Empowered (VYBE) afterschool clubs at 10 junior and senior high schools, a program designed to be a fun, inclusive, and safe environment to discuss health-related issues based on students' specific interests. VYBE participants are encouraged to relay what they have learned to their peer groups.

Apart from its education and advocacy components, MTA provides clinical services. MTA delivers counseling, testing, and referral to target populations and refers those individuals who test positive for HIV to follow-up care. Individuals who are HIV positive also can enroll in the Care Advocacy Program, which links youth to continuum-of-care entry points and reconnects youth who have fallen out of care back to a medical care provider. A new program introduced in 2008 is the Family Center, which supports individuals who are infected with and affected by HIV/AIDS. The Center provides support to HIV-positive mothers and caregivers of children whose parents have died of AIDS, offers therapy for children in families affected by HIV/AIDS, and facilitates support groups for HIV-positive young adults.

The two final program areas in MTA's array of activities include social marketing, whose main component is REALtalk, a text messaging campaign, and community capacity building, where MTA staff train other youth-serving organization in ways to incorporate HIV prevention education into their services.

Of the four agencies participating in the EOR Initiative, MTA is the largest in staff and budget. In 2008, its operating budget was $1.7 million, which grew to a proposed $2.3 million for 2009. MTA relies on a mix of full- and part-time paid staff and volunteers. During the initiative, MTA had 16 full-time staff; the number of part-time staff started at 42 and ended at 29. In addition, MTA employs 15 to 20 local students as part of the D.C. Youth Employment Program. MTA incorporates volunteers in its work at many levels, including volunteers for one-time service-learning events and alternative spring break programs to longer-term volunteers in outreach in sexually transmitted infection testing corps.

Evaluation before the EOR Initiative

MTA has incorporated some program evaluation into its work since its founding in 1988. Until 2003, MTA tracked its services and researched clients ad hoc mainly for grant reporting. That year, MTA began a partnership funded by the Substance Abuse and Mental Health Services Administration with Shattuck and Associates, an outside evaluation firm. The interaction centered only on the Making Proud Choices! program. In the first year, Shattuck and Associates trained staff and assisted in developing a work plan, logic model, and evaluation plan for this program. MTA created a pre-post survey tool, a consent form, and a parent approval letter for use in the program. Since then, MTA has continued to contract with Shattuck and Associates to receive help in the analysis of MPC!, which has extended to other program areas.

In 2004, MTA established measurable objectives for all its programs, primarily to report outcomes to the Washington, D.C., city government, which had funded several MTA programs. MTA began using the Efforts to Outcomes (ETO) performance management software to track counseling and testing services. With this effort, MTA began for the first time to use these reported outcomes to better tailor the services it provided. In 2005, MTA developed a protocol for its street outreach program designed to identify the respondent population and control for duplicate interactions, as well as a pilot for youth-led interviews. The protocol is based on the Real AIDS Prevention Project (RAPP) model, a community mobilization program consisting of outreach in small groups as well as with businesses.

MTA published a brief on the Making Proud Choices! campaign using data collected through the survey developed with Shattuck and Associates. The evaluation and program development manager also developed and implemented a needs assessment survey to gauge the HIV/AIDS training needs of Washington, D.C., school nurses. A full list of instruments available before the EOR started is listed in exhibit 11.

Evaluation during the EOR Initiative

Before the EOR Initiative, MTA had made considerable progress in creating and developing the staff, software, tools, and processes needed to promote successful evaluation. Toward the beginning of the initiative, Urban Institute's technical assistance focused on strengthening outcome measures and tools for specific programs. MTA already had some measures in place from previous work, such as its work with the consulting

Exhibit 11. MTA Monitoring and Evaluation Instruments in Place at the Start of EOR

- *HIV 101:* tracking form and exit questionnaire
- *Making Proud Choices!* HIV prevention education in schools: pre- and post surveys
- *Freestyle:* Basic information form, youth attendance form, GLI report form, and youth development survey
- *HIV counseling and testing:* DOH and CDC bubble sheet (intake form) and brief risk survey (administered by Care Advocate)
- *Street Outreach:* outreach survey cards

group on MPC! and its needs assessment survey of nurses. Moreover, many instruments had staff buy-in to keep the processes in place. However, two challenges were present. First, any progress in developing new tools or updating existing ones was driven by donor needs, and not by a culture of evaluation. Also, MTA lacked a unifying plan for the organization to assess what the overarching outcomes to track would be.

EOR allowed MTA to significantly expand its capacity for evaluation by providing the resources to hire, for the first time, a full-time evaluation specialist to coordinate the efforts between the wide array of programs the organization offers. The newly hired evaluation and program development manager, a member of the MTA management team, attended conferences and seminars aimed at increasing knowledge of evaluation and quality assurance. She also began to incorporate evaluation and outcome assessment into the daily activities of staff at MTA by, for example, convening outcome management meetings with a few of MTA's program managers, and then creating a spreadsheet tracking funders, deliverables, outcomes, and existing data sources by program.

MTA developed a formal evaluation plan during the initiative based on other public health agency examples. Drawing from other public health plans allows MTA to benchmark its results to indicators from similar organizations nationwide. The plan includes a brief overview of the organization, its history, and its program areas. It contains an organization-wide logic model that relates MTA's activities to three strategic goals it seeks to achieve. The logic model relates each of MTA's 16 outcomes to each other chronologically. For example, one of MTA's long-term goals is to decrease the rate of HIV transmissions among D.C. youth. Exhibit 12, a simplified excerpt from MTA's logic model, illustrates how early and intermediate outcomes lead to this end outcome.

For each outcome, MTA also identified indicators to measure its progress, usually a number of a program's participants or a share of youth who exhibit a particular characteristic. MTA linked these items with a data collection tool to capture this information—either an already existing tool or one in development. Often, several indicators could be measured with a single tool, and some tools can overlap across outcomes. An example illustrating how the outcomes presented in exhibit 12 link to specific indicators and data collection tools is presented in exhibit 13.

MTA also created a detailed description of evaluation. For each program area, MTA's plan lists the forms and tools necessary for the evaluation. Then, for each particular activity within the program area, MTA described the manner of data collection, entry, and analysis protocols, including the materials needed, such as binders, logs, and ETO documents, as well as the timing and frequency of each action. Exhibit 14 shows an example of the evaluation process for the Street Outreach program. To better help the organization plan its data collection and analysis, MTA also created a timeline for all evaluation efforts. Each evaluation tool, divided into the different program areas, is plotted against a month-by-

Exhibit 12. Illustration of Early and Intermediate Outcomes Linked to an End Outcome

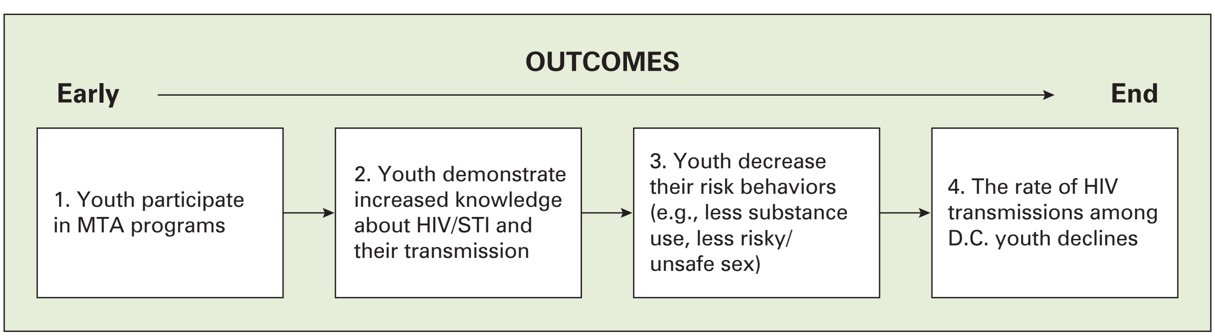

Exhibit 13. Sample Outcomes Linked to Indicators and Data Collection Tools

Goal: Decrease the rate of HIV transmissions among D.C. youth		
Outcome	**Indicators**	**Data collection tool**
1. Youth participate in MTA programs	1A. Number of youth who attend Freestyle 1B. Number of youth who participate in MPC! 1C. Number of youth who participate in VYBE clubs 1D. Number of youth who attend HIV 101s 1E. Number of youth who work as peer educators 1F. Number of youth reached through outreach efforts	Freestyle attendance sheet (1A) MPC! attendance sheet (1B) VYBE attendance sheet (1C) HIV 101 contact information sheet (1D) HIV 101 presentation tracking log (1D) Peer educator roster (1E) Street outreach cards (1F)
2. Youth demonstrate an awareness of available resources and supports	2A. Number and percentage of youth who report increased awareness of available resources and supports after being involved in Metro TeenAIDS programs and services	HIV 101 exit survey (2A) Freestyle YDS (2A) VYBE assessment tools (2A)
3. Youth decrease their risk behaviors (less substance use, later onset of first sexual encounter, less risky sex)	3A. Number of youth who decrease substance use after involvement in MTA programming 3B. Number of youth who delay onset of sexual activity after MTA programs 3C. Number of youth who engage in less risky sex	MPC! post test, follow-up (3A, 3) VYBE! post test, follow-up (3A, 3B, 3C) Freestyle youth survey (3A, 3C) YRBS—substance abuse (comparison with D.C. youth in general)
4. The rate of HIV transmissions among D.C. youth declines dramatically	4A. Number of new HIV diagnoses 4B. Number of HIV tests taken by youth	DOH surveillance report (4A, 4B)

month calendar. The timeline illustrates when and how often each tool is used, and with which other tools it overlaps. These tools serve both as documentation of the cycle of evaluation activities and as a tool for helping sustain such efforts in the future, should staff changes occur.

While creating the evaluation plan, MTA staff noted that evaluation could have broader uses than for program development; it could help the organization reduce HIV/AIDS transmission in the District and increase knowledge about HIV/AIDS and STIs. Apart from enhancing, creating, and consolidating programs, MTA now plans to use its evaluation findings to serve as a resource for community members such as youth, teachers, and government officials. The evaluation findings would also provide a tool for educating decisionmakers and informing policy. As such, toward the end of the initiative, MTA requested assistance in undertaking more detailed analysis in a single program area. The idea was to develop a "prototype for analysis" that could eventually be replicated in other program areas.

The first program selected was outreach services. The evaluation specialist retained assistance from four student interns from the Georgetown University International Health Program. During the spring 2009 semester, they undertook and completed data entry and preliminary analysis of several hundred outreach data cards, spanning the past two years. MTA requested assistance from UI in review of preliminary data runs, the design of an evaluation plan, and specific assistance in mapping information according to various client

Exhibit 14. Street Outreach Program Evaluation Process

Data Collection

1. When conducting street outreach, outreach workers should bring street outreach cards, pens, safer sex kits, other safer sex material, referral information, and backpack/bag.
2. When engaging youth in street outreach interaction, ask them to fill out the participant side of the street outreach card.
3. After street outreach encounter or session, the outreach worker should fill out the outreach worker side of the street outreach card.
4. Return completed street outreach cards to street outreach box and file the cards in the month outreach occurred. (If HOPE team or peer educators prefer to give their completed cards to their supervisor, then those supervisors are responsible for putting completed cards in the box.)

Data Entry

5. Using the street outreach card box,
   - interns number street outreach cards for each month.
   - after cards are numbered, interns enter every fifth card's information into an Excel file. (→ SPSS)

Data Analysis

6. Monthly output updates of
   - how many youth were reached through street outreach by staff, peer educators, City Year members, and volunteers.
7. Yearly updates of
   - youth reached in street outreach by ward, age, and race/ethnicity, gender, and sexual orientation.
   - youth sexual activity, the safety of their sexual activity, and their HIV testing status.

demographic and geographic characteristics. MTA plans to summarize findings in an outreach brief, which they expect to disseminate to various audiences. This brief will be used to inform where and with whom to focus future program efforts, including where to have testing events or present HIV 101 sessions. The brief will also be disseminated to other organizations in various coalitions and policymakers interested in youth behavior and sexual health concerns. MTA's experience analyzing outreach data has helped the organization clarify the level of effort required to undertake a more detailed review of the data, and the organization hopes to model this experience in other program areas in the future.

Summary Assessment

The EOR Initiative has helped MTA better cultivate a culture of evaluation. Core to its success has been strong management support and two very moti-

Key Successes and Challenges

Successes

Developed a comprehensive logic model, linking goals and outcomes across many disparate programs

Developed detailed documentation of evaluation procedures and preliminary data analysis plans for each program area

Modeled a process for undertaking analysis in a single program area, to be replicated with other programs in the future

Challenges

Identifying appropriate data collection strategies for tracking long-term client outcomes (e.g., HIV transmission)

Linking program activities with behavioral outcomes (due to brevity of contact or confidentiality concerns) vated evaluation specialists. Throughout the initiative, MTA worked hard to review and refine evaluation strategies, identify gaps, engage agency staff at many levels, and begin to integrate evaluation across multiple program areas. Although this integration will require more time and effort, long-term prospects for MTA look promising.

Moving forward, MTA has expressed its commitment to support a staff position focused on evaluation beyond the term of the EOR grant. As such, it has begun to incorporate evaluation in all new funding requests. MTA has articulated plans to develop a number of additional assessments for their peer education and youth leadership development programs, as well as a school staff assessment to better understand how program activities may or may not be influencing youth outcomes. MTA will continue to analyze existing program data and has plans to develop issue briefs for outreach and other program areas.

Notwithstanding all the progress made to date, MTA faces a few challenges. From an evaluation standpoint, it remains very difficult for MTA to quantify or document the impact of several activities (e.g., outreach) because of its inability to link interventions to longer-term outcomes, such as HIV transmission rates. Creating such links between clients and outcomes would likely require a sophisticated system for identifying and protecting client confidentiality, as well as an expensive evaluation design. Absent this level of effort, MTA may be limited in its ability to claim credit for citywide effects, but it should still be able to document successful outcomes for program clients.

From an organizational standpoint, with so many different programs and initiatives operating simultaneously, MTA will have to work hard to sustain its focus and commitment to a wide array of evaluation strategies. To address this, MTA should seek ways to promote continuity in the evaluation manager's position, as well as consider appropriate training opportunities for this position or others in the agency that support it.

Urban Alliance Case Study

Urban Alliance (UA) is a youth development organization that focuses on providing high school seniors from poorer areas in Washington, D.C., with the training and mentoring necessary to make a successful transition to higher education or employment after graduation. Since its founding in 1996, UA has trained approximately 1,200 students through its program, growing to serve 250 students a year and expanding to a site in Baltimore in 2008. Core to UA's services is a year-long program consisting of a 10-month internship, internship-readiness training, and post–high school planning. UA requires all students to participate in a paid three-week pre-internship training intended to familiarize students with résumé writing, interviewing, and other essential job skills. The program director then matches students who complete the training with a paid internship at a participating employer. Students work up to 12 hours a week while attending their senior year of high school. They earn a starting hourly wage of $7.55, which can rise to $10 an hour based on performance.

To support the students' transition into the workplace, they are assigned a program coordinator (similar to a case manager) and a job mentor (an employee identified by the job partner). Together, program coordinators and job mentors provide the students with support, feedback, and guidance. In addition to their internship, students attend weekly workshops on such job- and life-readiness topics as conflict resolution, goal setting, professional writing, and healthy behaviors. Students also learn to budget and build credit, and UA offers them the chance to start a matched savings account. During the summer, students work 32 hours a week at their internship site, with Fridays reserved for training.

The internship program is financially supported by the internship placement sites—most typically for-profit businesses, but also nonprofit and governmental organizations. UA aims each year to have 75 percent of its job partners sponsor their interns through a charitable donation to Urban Alliance. To cover remaining costs, UA raises additional funds so students can be placed at unpaid job partner sites such as nonprofits or government agencies. UA places interns with diverse needs—for example, teen parents—at sites that will afford them more flexibility and support while still allowing them to work. These sites tend to have more experience with youth development.

In recent years, UA has augmented and expanded its high school internship program. The Health Alliance Program, started in 2003, has offered disadvantaged D.C. high school graduates training at the University of the District of Columbia to earn an associate's degree in nursing and part-time employment at a local hospital. Because of a lack of capacity and funding, the nursing program is set to terminate in 2010. Since the program's inception, 42 participants have obtained a certified nursing assistant license.

UA began offering education and career support services to alumni as a result of the EOR Initiative in 2007. Interested alumni receive continued training in workplace skills, help enrolling in and navigating higher education, and assistance searching for permanent jobs. UA remains in touch with alumni and posts job announcements through a networking web site it hosts as well as existing social networking services such as Facebook, LinkedIn, YouTube, and Twitter. These services also facilitate past participants reconnecting with their peers. Contact with alumni additionally benefits the organization by allowing staff to track long-term outcomes such as college retention, college graduation, income, and job retention.

In 2008, UA's operating budget was $1,750,000, which increased by $100,000 in 2009. The organization has 11 full-time paid staff and three part-time paid staff who work 15 hours a week. Because of the one-on-one mentorship component is central to UA's internship program, the organization counts roughly 150 unpaid volunteers among its ranks. Mentors are expected to work about five hours a week with their intern.

Evaluation before the EOR Initiative

In its first four years (1996–2000), program evaluation at UA was informal. The organization developed five goals for youth participants to its internship program. Specifically, youth would improve their hard and soft job skills, graduate from high school, attend college or a training program, identify employment opportunities, and gain long-term employment experience. UA measured its success in accomplishing these goals only at sporadic and informal "check-ins" with staff and students. Staff simply recorded how many students finished the program and how many enrolled in college or obtained a job after graduating from high school.

In 2000, UA added more detail and precision to its methods for evaluation by visiting the internship sites and developing tracking notes and end-of-program reports. Tracking notes are weekly reports of student progress written by UA staff and include records of contact with students and mentors, issues at internship sites, and other helpful information. UA began writing end-of-program reports for each student as an avenue for both program coordinators and mentors to reflect on the entirety of the student's internship. Program staff discontinued these reports because they were not found to be useful. To further track whether students were achieving UA's main goals for the program, staff began to make site visits to mentors three times throughout the course of the internship to discuss student progress.

Until 2002, tracking notes, end-of-program reports, and site visit notes were captured in Microsoft Word and were unable to be aggregated for formal analysis. In 2002, UA purchased Efforts to Outcomes (ETO), which allowed UA to better develop its program evaluation capacity. With this new tool, UA added greater specificity to the tracking and site visit notes so evaluation staff could generate reports for each student or for the program as a whole.

Urban Alliance staff developed these measurement tools for hard and soft skills based on the National Youth Employment Coalition standards. During site visits, UA administers skills evaluations—formal assessments involving the mentor, program coordinator, and intern. Site visits occur four times during the program year: at baseline, winter, spring, and program completion. Mentors complete the assessment form, which UA enters into student records in ETO. Soft skills are divided into four categories: professionalism (attendance, punctuality, attitude, and attire), communication (listening, speaking, reading, writing), job competency (task completion, accuracy of work, initiative, time management), and development (balancing responsibilities, accepting criticism, following directions, setting and planning goals, understanding consequences). Hard skills are divided into basic (fax, file, copy), intermediate (answer phones, enter data, greet visitors), and advanced (research, note taking, computer skills).

More than the other three organizations in the initiative, UA used its growing program evaluation ability to change programming (even before receiving technical assistance from UI). This organizational commitment to using program evaluation better positioned UA to take advantage of the EOR Initiative. One example where UA used program evaluation to improve its services occurred in 2007. UA found from information gleaned during site visits and data on student retention that students tended to lose interest and drop out of the program at some point during their internship. To address this negative outcome, program staff decided to offer students pay raises at particular points in the program. Analysis of those same indicators suggests that this change helped motivate students and keep them enrolled in the program.

A second example of UA using evaluation to refine program design occurred when the organization received feedback (from students and worksites) that the interns were not sufficiently prepared for the workforce environment. UA extended pre-work training from one to three weeks and witnessed a significant increase in baseline job skill ratings. The added training resulted in better-prepared students, higher employer satisfaction, and increased program retention rates.

Evaluation during the EOR Initiative

UA began its interaction with the Urban Institute in the East of the River Initiative already having some experience using data from evaluation to inform programming. This capacity was substantially expanded and refined under the initiative. The initiative resulted in important changes to the organization, including introducing a new program, shifting staff responsibilities, and redesigning agency reporting.

Early in the EOR Initiative, Urban Alliance became interested in tracking long-term programmatic outcomes. Through an independent project, students from the George Washington University Graduate School of Education and Human Development wrote a report outlining the long-term outcomes of UA's internship program by observing the change in the share of alumni with higher-paying jobs.[5] The authors recommended that UA gather more longitudinal data and improve its qualitative analysis through speaking with both participants and employers.

Through this interaction, UA realized that it was not formally tracking students who had participated in the internship program in years past. Seeking to remedy this, UA conducted informal interviews to assess alumni outcomes. In doing so, staff discovered that alumni still needed UA's services, especially job and career counseling. As outreach to this group continued, UA decided to create a new alumni services program with the specific mission of providing the services alumni needed and acting as a vehicle for keeping in contact with them. To ensure that the alumni services program achieves its goals, UA realized the value of creating a formalized evaluation structure to guide program development.

As with the other three organizations, the bulk of UI's technical assistance helped create this comprehensive and customized evaluation plan for the organization, including a logic model and a detailed description of UA's evaluation processes. UA's evaluation plan described which outcomes were being measured and which ones had yet to be added. The plan linked program activities with long-term outcomes and specific performance benchmarks. Since UA's provision of alumni services is relatively new, staff are still working to determine appropriate goals and targets for this program.

Urban Alliance's goal in creating a logic model was to provide a generalized vision of what the organization views as its key outcomes and how each activity addresses one or many outcomes. In this case, UA created two separate models, one for the high school internship program and one for its alumni services. An excerpt of the high school internship logic model is presented in exhibit 15.

The UA logic models are organized by activity, of which there are four for the internship component and eight for alumni services. The logic models then describe outputs associated with each activity. For example, the first activity of the internship is to "place students in professional, paid internships to expose them to the world of work." The associated output is that students master the skills necessary to function in a professional working environment. The next three columns in exhibit 15 are divided into short-term, intermediate, and long-term outcomes and indicators. The UA logic models define short-term outcomes as those that occur within the first six months of the intervention, intermediate as within the year, and long-term as anything beyond one year. Thus, for the internship program, only long-term outcomes and indicators occur outside the scope of the internship activity itself.

Exhibit 15. Excerpt from Urban Alliance Logic Model for the High School Internship Program

Activity	**Output**	***Short-term outcome (within first 6 months)***	***Intermediate outcome (within first 12 months)***	***Long-term outcome (12 months and beyond)***
Place students in professional, paid internships to expose them to the world of work	Students master the skills necessary to function in a professional working environment	Students are exposed to wide variety of hard and soft skills, and continue to increase their mastery	Students gain long-term work experience	Students are better able to search for and obtain sustainable employment
		Indicators:	***Indicators:***	***Indicators:***
		1) Spring skill evaluations by mentors demonstrate students have been exposed to at least 7 skills in each level (basic, intermediate, advanced) 2) Students show an increase in the mastery rating between the fall baseline skill evaluations and the spring skill evaluations	1) 75% of students initially enrolled in the program in the fall successfully complete a year-long internship by attending work regularly and in a timely manner, as well as managing their time to balance personal, academic, and professional responsibilities	1) 80% of alumni report UA's internships prepared them for the world of work 2) 75% of alumni report being enrolled in college or working at a stable position

With the help of UI, Urban Alliance designed pre- and post-program surveys for the high school internship component, a close-ended web survey of alumni, and qualitative semi-structured interviews with alumni. Previously, UA only used a simple pre-program survey that followed the core goals of UA but did not capture a full range of outcome measures. The recently designed surveys and interview guides work from the UA logic models to ensure that they capture the indicators necessary to assess program performance. The pre- and post-program surveys ask whether students have a current resume and cover letter, whether they have applied to college, and for a description of their financial situation. The surveys ask for attitudinal measures, including students' outlook on their education and work and reflections on their future careers. There are also two tested scales to measure students' self-efficacy and racial comfort, drawn from previous studies.

Urban Alliance designed the pre- and post-program and close-ended alumni surveys to have many overlapping questions. This duplication allows UA staff to track changes in respondents over time. Of course, the surveys have some elements that differ. The pre-program survey, for example, goes into greater detail about participants' past employment experience and their family life. The post-program survey asks about how Urban Alliance affected participants' plans for attending college. The alumni survey is similar to the pre- and post-program surveys, but it asks additional questions on postsecondary education. As an example of the differences and similarities between the three surveys, exhibit 16 presents questions dealing with employment from each of the three surveys.

In addition to the three surveys, Urban Alliance collects evaluation outcome information from alumni through qualitative semi-structured interviews. The alumni interviews ask former interns to consider more broadly the effect of UA on their lives. These interviews ask alumni to reflect on several aspects of their experiences before involvement with UA, their educational

Exhibit 16. Employment-Related Questions from Pre-Program, Post-Program, and Alumni Surveys

Pre-Program Survey

1. Have you ever had a job (worked for pay) before coming to Urban Alliance?
2. How many jobs have you had?
3. How long did you hold each job (on average)?
4. How much did you earn (hourly) at the end of your most recent employment?
5. Was your job(s) through the DOES Summer Youth Employment Program?
6. Do you have a résumé that includes your most recent job?
7. Thinking about your life 10 years from now, if you could pick your career with no limitations, what would it be?
8. Thinking about your life 10 years from now, what do you think your career will be in 10 years?

Post-Program Survey

1. Do you have a résumé that includes your most recent job?
2. Do you have a cover letter that has been updated since you applied for your last job?
3. Thinking about your life 10 years from now, if you could pick your career with no limitations, what would it be?
4. Thinking about your life 10 years from now, what do you think your career will be in 10 years?

Close-Ended Alumni Survey

1. Are you currently working?
2. Who is your main employer?
3. How long have you been working at your main job?
4. Before taxes or other deductions, how much are you paid in your main job, including tips and commissions?
5. How many hours per week do you work?
6. How many weeks have you worked in the last month?
7. In how many of the years since you were last enrolled in school have you worked at least six months during the year?
8. Do you have a résumé that includes your most recent job?
9. Do you have a cover letter that has been updated since you applied for your last job?
10. Thinking about your life 10 years from now, if you could pick your career with no limitations, what would it be?
11. Thinking about your life 10 years from now, what do you think your career will be in 10 years?

and professional experiences after the UA internship, and their views on how well the UA program prepared them for later pursuits. A few questions in the alumni survey attempt to gauge interest in additional programming and involvement with alumni services.

For each of the three surveys and the qualitative interviews, UA developed data collection strategies. These strategies include identifying the appropriate respondents, the mode by which survey or interviews will be fielded, and their timing and recurrence. UA fielded an experimental wave of the alumni survey to assess its ability to return reliable and useful information in 2007. The alumni survey is being fielded again in July 2009. The pre-program survey will be administered in September with the next cohort of interns. The post-program survey will be administered in June 2010 at the completion of the internship program. The qualitative alumni interviews will occur at the UA office and be conducted by volunteers trained by the director of operations. Interviewers will be audio recorded and transcribed. UA plans to interview two students from each class every other year; interviewees will be randomly selected within class years.

Urban Alliance developed a preliminary plan for data analysis and the use of the analysis, though it has yet to implement this plan. In general, UA will categorize all analysis into three groups: programmatic design, development (i.e., fundraising), and communications. For some indicators, UA is interested in trends over time, such as with skills data from the entry and exit surveys. In other cases—especially survey data collected from alumni—the main analysis will be to track individual students over time. The long-term qualitative information, which UA has not yet collected, will be used to inform future surveys and program activities, and potentially as student narratives in development and communications materials. In addition, UA hopes to conduct or commission a long-term evaluation, comparing graduates of the high school program with others who did not participate.

Summary Assessment

Urban Alliance has considerably increased its capacity for evaluation since it began receiving technical assistance from the Urban Institute, but some pieces of this evaluation agenda remain works in progress. The evaluation plan, a key product of the technical assistance, contains several components that are both detailed and up to date. However, the plan itself is not yet complete. For example, it does not yet fully articulate data collection strategies or plans for data analysis and reporting.

Likewise, in the past few years UA has developed high-quality survey and interview instruments that, with some refining, can be implemented for successive cohorts of high school interns and alumni. More technically, with assistance from the initiative, UA was able to revamp its reporting of outcomes—separating reporting for internal program evaluation from external funder- and publicity-driven reporting.

UA established a firm evaluation calendar, reviewing results three times a year and holding a strategic planning session during the fall. With data from the current round of alumni surveys available in fall 2009, UA will need to develop a system of analyzing the results and, once this is done, consider whether the survey needs revisions. Similarly, UA will need to develop a process for data analysis and survey redesign for the pre- and post-program surveys. Finally, as data have been collected and analyzed, UA will need to continue to incorporate any analyses into its programming, making necessary changes to better achieve its goals.

A main reason that UA has been able to make progress—which has been both significant and, at times, slow—is the nature of the position held by the evaluation specialist. The UA evaluation specialist serves in one of five director positions in the agency, and as such has more discretion to convene and direct agency staff than in the other agencies. However, programmatic and organizational changes in the past few years have meant that, increasingly, this staff member needed to expend his effort and time helping expand the internship program to other sites and taking care of other tasks.

Nonetheless, agency commitment to supporting an employee whose responsibilities primarily include evaluation work is not in question. As a

Key Successes and Challenges

Successes

Establishing procedures and data collection strategies to follow up with clients (alumni) after they have exited the program

Investing decisionmaking authority in evaluation specialist function (senior staff status)

Building evaluation as a core agency function

Challenges

Evaluation specialist at times drawn away by competing job demands

Work still needed to develop analysis and reporting strategies for several areas in the current evaluation plan result of the EOR Initiative, UA created a specific position for a director of operations within the organization, at a senior level and with access to leadership and authority to convene program staff. Recognizing that the evaluation specialist, like in most nonprofits, will continue to be drawn away to deal with nonevaluation-related issues, UA has decided to reserve a portion of his time for these matters. The director of operations expects to spend about half his time doing evaluation work and the remainder responding to special projects. UA looks to ensure sustainability of this position by including a small budget for evaluation in all future grant submissions.

Youth Power Center Case Study

The Youth Power Center (YPC), formerly known as the Good Samaritan Foundation, is a nonprofit serving youth in southeast Washington, D.C. Founded by a group of Washington Redskins football players in 1993 as a charity to provide clothing and food to residents, YPC has since shifted its focus to providing comprehensive year-round after-school programs for high school–age youth. YPC seeks to equip youth with the skills, training, and resources they need to successfully complete high school and advanced education and to prepare for the workforce.

A primary issue YPC faces is managing its programming and administrative responsibilities with a small core staff. YPC is a small nonprofit, with three full-time staff and an annual budget of $620,000. In addition to the full-time paid staff, YPC has seven full-time volunteers funded for 12 months through the VISTA and AmeriCorps programs. YPC has about 22 part-time volunteers who work between 10 and 20 hours each month on various tasks.

YPC's focus has evolved over the life of the organization. After beginning as a clothing and food provider, YPC started an after-school mentoring program, and then extended to workforce development. By 2008, YPC's executive director embarked on an effort to streamline and simplify the organization's efforts. YPC began by categorizing its goals into four topic areas, based on its experiences with other programs such as Makin' It and Character Counts. YPC's first goal is academic proficiency, strengthening each youth's ability to perform well academically and graduate from high school. For its second goal, workplace literacy, YPC seeks to enhance youths' skill sets in seven areas: skill acknowledgment, introduction to the workplace, basic office decorum, interview training, résumé and cover letter writing, ethics, and financial responsibility. For its third goal, personal integrity, YPC seeks to develop youth in six areas: trustworthiness, respect, responsibility, fairness, caring, and citizenship. Finally, YPC seeks to grow youth into civic-minded individuals who improve their community and participate in the political process.

Out of these goals, YPC created three distinct programs: the after-school, workforce development for disconnected youth, and mentoring programs. The after-school program currently targets students at one middle school and two high schools east of the Anacostia River. In the 2008–09 school year, approximately 36 students from Kramer Middle School, 45 students from Ballou High School, and 45 students from Anacostia High School participated in this program. Its main focus is to assist youth in performing at grade level, graduating from high school, and entering institutions of higher learning or obtaining jobs with strong advancement options. The program is year round: during the school year, students attend weekly mentoring sessions; during summer vacations, students attend three three-hour workshops a week on workplace literacy. Most workshops are facilitated by YPC staff and focus on career-building and soft skills, while other workshops are led by local business owners or alumni. Participants also receive paid summer internships with partner employers. For middle school–age students, an additional educational and literacy enhancement provides reading, writing, and math enrichment to help youth perform at grade level. For Anacostia High School students, YPC added a community service component to help 12th grade participants achieve the 100 service hours required for graduation.

The second YPC program—in its beginning stages—centers on preparing out-of-school youth for employment. Out-of-school youth include those age 24 and younger who have dropped out of the school system. The program includes GED preparation tutoring, training in Microsoft Word and Excel and other computer skills, and career and job services for those who complete the program. The career services component includes help with job searches, résumé writing, interviewing techniques, and financial management. In addition, YPC staff hope to bring in potential employers from local businesses, such as managers at Walmart or Giant grocery stores, to speak with participants about ways to improve their employability. Apart from trainings, students who gain employment participate in periodic check-in sessions with YPC mentors. This program seeks to help graduates not just become employed, but also be able to remain employed for extended periods. The winter 2008 program served 10 students, and 16 are expected for the summer of 2009.

The final component, entitled Championing Our Students (COS) is a nationwide mentoring program organized by the American Bar Association Division for Public Education, in partnership with the Council on Legal Education Opportunity (CLEO) and America's Promise Alliance. There are five participating nonprofits nationwide; YPC is the Washington partner. Although still in its beginning stages, the program expects to pair 100 students in the greater Washington region between the ages of 12 and 18 with an individual mentor who has a background in law or law enforcement.

In the past few years, YPC has faced challenges fully implementing its programs and attracting and retaining youth. In the 2007–08 year, 50 students participated in programming. Staff at YPC spent a great deal of time focused on applying for grants to support the organization. Although YPC projected that construction would be completed on its new building by August 2008, the opening was delayed by a budget shortfall, and the building ultimately never became available. The lack of a permanent home limited YPC in its programmatic and administrative capabilities for several months in 2008, particularly in youth involvement and retention. Despite these challenges, however, YPC was approved by D.C. Public Schools to serve approximately 120 youth during the 2008–09 school year in its after-school programs.

Evaluation before the EOR Initiative

YPC had a relatively limited history of evaluation before the East of the River Initiative. In 2004, YPC retained the Management Assistance Group (MAG), a Washington-based consulting organization, to assist it in strategic planning. The main areas for growth that MAG noticed were that YPC lacked clearly articulated long-term and shorter-term outcome measures to provide direction for the program. In short, YPC lacked an overarching mission or, as MAG called it, a "finish line" against which YPC could judge itself. Likewise, MAG did not see a framework that could tie the strategies YPC employed to outcome measures. The final recommendation from MAG's report was that YPC clearly define the outcomes it sought to accomplish, possibly through a logic model. Until the beginning of the East of the River Initiative, however, YPC had not begun developing this logic model, nor outcome measures or the evaluation plan that MAG had also recommended.

Before the East of the River Initiative, YPC assessed its effect on youth served by measuring their academic factors (grades, graduation rates, school attendance, and performance in college) and employment, and by observing students' engagement in leadership activities at school, in the community, and at YPC. Specifically, YPC collected baseline data on students entering the program, and then tracked progress primarily by checking quarterly student report cards for grade improvements. To enable youth participants to have a say in the design of the after-school program, YPC also asked youth about their expectations from the program and their interests. These efforts were facilitated with assistance from a community volunteer knowledgeable about evaluation and program design.

Evaluation during the EOR Initiative

In the beginning of the EOR Initiative, UI worked with YPC to establish a basic evaluation plan and to begin tracking and measuring some program outcomes. Drawing from the recommendations that MAG suggested, YPC's first step was to hold a focus group with students in order to involve them in the design, planning, and implementation of the after-school youth program. In December 2007, staff from YPC met with 10 high school students and asked about their preferences. YPC then incorporated some of their suggestions into the programming. For example, students requested breaks between activities, as well as new approaches to use of YPC's physical space during workshops.

YPC turned next to developing an evaluation plan, which early in the initiative was incorporated into a grant proposal for AmeriCorps volunteers. In that proposal, YPC outlined potential data sources, data collection approaches, and analyses. Toward the middle of 2008, UI encouraged YPC to expand its initial proposal into an in-depth evaluation plan. UI staff worked with YPC to first make basic and specific decisions about program details, such as whether program participants would participate in all areas of the program and whether all age groups would be involved in similar types of activities. To this end, YPC drafted a document describing a student's typical week and discussed these issues at a staff retreat before the 2008 school year started.

YPC completed a draft evaluation plan in June 2008, providing a brief overview of the organization and its programs as well as a logic model linking outcomes to indicators and describing associated data collection tools and frequencies. The logic model, excerpted in exhibit 17, outlines five intermediate outcomes, including improving academic achievement, learning soft skills such as teamwork and problem solving, and increasing awareness of the impact of risky behaviors such as gang violence, bullying, and substance abuse. Indicators associated with these intermediate outcomes include the number and share of students who are engaged in risky behaviors, who feel safe, who successfully complete YPC programming, who increase attendance at school, and who improve their academic performance.

For each indicator, YPC's logic model identifies data collection tools for obtaining information related to each measure. Most data sources described in the evaluation plan are administrative records, including report cards, transcripts, and employment information. YPC also describes two end outcomes: youth graduating from high school on time and pursuing their future goals, as well as youth becoming self-sufficient by achieving and sustaining employment. The indicators associated with these end outcomes are the number and share of students who graduate high school on time, obtain postsecondary education, and join the workforce. Exhibit 17 shows a section of the logic model for an intermediate and end outcome.

In addition to designing a logic model, UI assisted YPC in developing a baseline survey of the out-of-school youth employment program. The survey captured civic engagement measures, a self-assessment plan, and a meaningful way of reporting graduation rates. These tools are expected to be fully implemented during the 2009–10 school year.

During the course of the initiative, YPC faced challenges that diverted attention from the evaluation goals to programming and financial stability. In particular, slow progress on the construction of the new YPC building and limited funds to hire program staff meant that the evaluation specialist was frequently pulled away from evaluation to other pressing issues, such as program design and grant writing. Although YPC spent a great deal of time developing an evaluation plan during the course of the initiative, several changes in program focus have resulted in multiple revisions. Various pieces of the plan are still under development. To date, YPC has primarily used the evaluation plan and beginning data collection to support its fundraising work. In fact, YPC credits the EOR Initiative with helping the organization to more effectively

Exhibit 17. Logic Model Excerpt

Outcomes	Indicators	Data collection tool	Frequency
Youth feel safe, secure, obtain healthy relations, and increase their attendance in the program and the school (intermediate)	Number and percentage of youth who feel safe, secure, obtain healthy relations Number of youth who increase their attendance in the program and the school	Questionnaire using scale, tally sheet, and direct service staff observations	Three months after the program start
Youth become self-sufficient by achieving and sustaining employment (end)	Number and percent of youth employed and able to keep their jobs	Alumni surveys, self-report	Annual

communicate goals and objectives, resulting in successful AmeriCorps grant applications for the first time in the organization's history.

Summary Assessment

In the coming months, YPC plans to solidify and refine its program model and to use program evaluation to inform program design. For the after-school program, much of the work will involve having conversations with school administrators and teachers at participating schools about their particular needs before the program starts. This input from will be paired with data drawn from administrative and other sources to help YPC design activities for participating youth. For the out-of-school youth employment program, YPC's next step is tracking participants both during the program and after completion. Tracking youth at their place of employment and about their plans for the future is expected to be facilitated by the use of software YPC intends to purchase before the initiative concludes.

Although YPC has made measurable progress over the past couple of years to implement a strategic planning effort and redefine its program focus and identity, many challenges present at the start of this initiative are likely to remain in the years to come. As a small organization, YPC will continue to have to spend a disproportionate share of time to fundraise in support of program operations.

From an evaluation standpoint, YPC faces at least two hurdles. The first is how well YPC will be able to support, sustain, and integrate the evaluation function and findings into the organization. Closely related to the first is how effectively YPC will be able to monitor and track youth outcomes over the long term and communicate program value. By design, YPC hopes to serve youth participants throughout their high school experience. Thus, special attention will be required not only in retaining youth in program activities, but also keeping track of youth once they leave the program. These are significant tasks for a small program.

Key Successes and Challenges

Successes

Effectively incorporating evaluation principles to successful grant requests, to leverage additional support to small agency staff

Progress on strategic planning exercise which led to a more solidly defined program focus and identity for the agency (name change and new logo)

Challenges

Construction delays on new space, resulting in difficulties attracting and retaining youth participants

Unstable program structure

Concluding Thoughts and Recommendations

The East of the River Initiative was designed to help a select group of nonprofit agencies more effectively capture and communicate their value to constituents and community. The community-level assessment—the first component of the initiative—helped the agencies place their services within a broader context of community need.[6] The organizational assessment component of this forward-thinking initiative provided staff resources to each participating agency that were supported with access to external evaluation guidance and support. This model gained greater traction in the two agencies with relatively stable and clearly defined programs that also happened to be better resourced and had more significant prior experience with evaluation and outcome measurement. Perhaps not completely unexpectedly, the agencies with fewer staff and less prior experience were slower to make progress, and neither, at the conclusion of the initiative, has complete strategies in place to ensure a sustained approach to evaluation. In retrospect, these agencies may have benefitted from a more structured technical assistance model that first sought to address key organizational issues before embarking on implementation of an evaluation design. The simple lesson here may be that these agencies need more time.

The model of collaboration advanced by the East of the River Initiative (between funder and grantee) is worth consideration and expansion for two key reasons. First, by design, the initiative offers a practical approach to help nonprofit agencies develop evaluation capacity by removing the burden of having to fundraise to support a new staff position, but also by providing intensive technical assistance to help set up the necessary strategies and structures for evaluation and monitoring. Second, the findings and recommendations advanced throughout this report are based on a sample of four agencies, hardly a sufficient number to confidently conclude whether this model is effective (or not) and under what conditions. The recommendations presented below are designed to help facilitate a constructive dialogue between funders, nonprofits, and technical assistance providers about how future efforts might be designed or enhanced.

Recommendations to Funders

1. Future capacity building efforts need to find the right balance between firmness and flexibility; while agencies need to be held accountable to their stated commitments, funders should expect to periodically revisit assumptions and expectations.

The initial design for the EOR Initiative assumed that over the course of a two-year period, beginning when the agency hired their evaluation specialist, each agency would develop an outcome monitoring plan, collect baseline data, collect follow-up data, analyze outcome information, and communicate these findings to key stakeholders. The evaluation specialist was expected to devote most or all of his or her time to these activities.

Although performance management guidebooks suggest that 24 months should be an adequate amount of time to accomplish these tasks, EOR agencies were generally unable to completely meet these expectations. This report details many of the challenges and obstacles faced by agencies, the need to reestablish goals and expectations midway through the initiative, and other factors that inhibited progress. Left unanswered, however, are several questions related to the appropriate roles and responsibilities of the key parties involved.

From the funder perspective, the EOR Initiative offered a new approach to building organizational capacity. The two-year timeline established to develop evaluation models with the support of a fully funded evaluation position was and remains a reasonable assumption. Unfortunately, since no agency met this full-time commitment, it is hard to say what would have happened. So, at the conclusion of the grant, we cannot say whether this level of effort was a reasonable investment to truly build the capacity of a nonprofit agency to undertake evaluation.

From the agency perspective, key questions include whether the agency truly bought into the expectation that the evaluation specialist would work full time on evaluation and, if not, what was its obligation to challenge this expectation at the outset of the grant; and, as other issues or challenges impeded progress on the stated goals for the organizational assessment, to what extent should the agency bring these issues to the attention of the World Bank Group and/or proactively seek agreement on modified expectations or timetables.

While it helps to understand some of the unique challenges faced by nonprofits and the unpredictable environments in which they operate, there still needs to be a reasonable structure of accountability between agencies and funders. Perhaps the way to achieve the proper balance between "firmness and flexibility" is for funders and grantees to work more collaboratively during proposal development and selection, and then throughout the term of the grant, to continually assess progress and redirect efforts as needed. Funders will need to exercise a certain level of due diligence under such an arrangement to read between the lines in proposals that promise to do more than may be feasible, as well as to ask better questions of prospective grantees about the promises they make in proposals. The idea is to promote a participatory approach to evaluation: to generate types of information useful to both the funder and the agency, to create an environment of trust and openness that encourages agencies to be up-front about challenges and difficulties encountered and funders to expect and accommodate reasonable changes in course.

2. Consider making a longer-term investment in agencies that demonstrate reasonable progress and commitment to a sustainable evaluation strategy.

Prior experience with evaluation was an important factor related to how much agencies ultimately accomplished during the two-year EOR Initiative. However, even for the agencies that advanced the furthest, more investments are needed to fully develop and sustain planned activities. Although unexpected events will invariably occur to divert agency attention or otherwise take them off course, some discernment is required to assess an organization's commitment to evaluation. A key question for funders is how to define reasonable progress and to anticipate conditions under which additional support is warranted.

For example, one such factor may be a consideration of the life cycle of the planned intervention. If the program expects to influence the lives of children over multiple years or life stage, it will likely need to engage in more elaborate tracking and follow-up methods both during and after the intervention. An example of this is an agency proposing to track high school graduation rates for clients who enroll in the program in 9th grade.

3. Where possible, seek ways to actively support and promote peer learning opportunities for evaluation specialists, both throughout the funded period of commitment and beyond.

The evaluation specialists uniformly agreed that the monthly meetings facilitated by the Urban Institute team were very helpful for sharing ideas, brainstorming solutions, and sometimes just commiserating over the challenges their agencies were experiencing. Since evaluation in many agencies (not limited to the experience of the EOR Initiative) is still relatively new and often not well-integrated into day-to-day programs and operations, evaluation staff can tend to feel isolated or like they are fighting an uphill battle to compete for scarce resources or purpose within the organization. The EOR model has helped legitimize the role of evaluation in participating agencies.

As the learning curves for each agency varied, so did the individual contexts in which evaluation strategies were developed. A structured peer learning environment can help agencies share resources, compare experiences or applications, and ultimately help advance the state of practice for agencies and individuals involved. Although the meetings for EOR occurred in person, there are other ways to structure these types of interactions. For example, the National Neighborhood Indicators Partnership listserv, *NNIPNews,* routinely includes posts from evaluators seeking tools or "how to" advice from other participants.[7]

Recommendations to Nonprofit Agencies

4. Evaluation is not an isolated activity: it requires integration with program operations and staff support from all levels of the agency.

Nonprofit agencies should view evaluation as first and foremost about helping the agency improve performance and the quality of services delivered. Although accountability is important, collecting data solely for the purposes of tracking how resources were spent or to meet compliance requirements of funders is not likely to result in cultivating a culture of inquiry. An important precursor of evaluation is an appreciation of why it matters and its benefits to nonprofits at all levels of the organization, including the board of directors, management, staff, volunteers, and donors.

Ideally, evaluation should be integrated at multiple levels of agency operations: strategic planning, resource allocation, program development, staffing, communications, and so on. Staff need to have an understanding of why evaluation data matter and how such information can help them identify gaps in services or suggest the need for new or expanded programs.

Such integration can be promoted by bringing staff together periodically to review program data and to explore simple relationships between the data, such as by linking program results to staff or financial resources applied to the program and looking at how outcomes may differ for different characteristics of individuals served. Although these sessions would likely be facilitated by a staff member directly involved with data collection efforts, management support is important to encourage a culture of learning and inquiry, and perhaps by inviting board members or individuals from outside the agency to participate and provide feedback or suggestions.

5. Expect incremental change, but don't underestimate the level of effort required to make measurable progress.

Evaluation takes time and effort, and, as demonstrated by the EOR Initiative, sometimes more than initially expected. By starting small—identifying two or three core measures by which success will be defined—agencies can begin to establish groundwork and support for evaluation relatively quickly. The purpose of designing an evaluation plan is not to accomplish everything immediately, but rather to develop reasonable planned activities that may unfold over a period of six months or several years. For most agencies just getting started, initial attempts to collect data or other information are likely to involve some level of delay, unexpected obstacles, and even error. Further, baseline findings may raise more questions than they answer. The good news is that if an agency is interested and committed to evaluation, many resources and experiences exist to guide and help troubleshoot problems.

6. Work backwards: first decide what story you want to tell, and then figure out how to tell it.

In 2006, the Stanford Social Innovation Review published the article "Drowning in Data," which concludes that "nonprofits are often collecting heaps of dubious data, at great cost to themselves and ultimately to the people they serve."[8] The article calls for agencies to think more strategically about the type and quantity of information needed to effectively communicate their value and contribution to community, also suggesting that agencies and funders consider more participatory approaches to the design and implementation of evaluation strategies, to ensure that the information collected is mutually beneficial to all parties.

Working backwards from the results or accomplishments a program hopes to achieve would help agencies focus on a few key measures of success, rather than wasting more time or effort than necessary capturing dozens of descriptive measures that may prove to be unimportant or irrelevant.

Recommendations to Technical Assistance Providers

7. Spend enough time at the outset to understand the organization's past experience with evaluation, its motivations for requesting assistance, and its potential for implementing and sustaining evaluation activities beyond the term of the assistance being provided.

Most nonprofits fall somewhere along a continuum of experience and interest in undertaking evaluation activities. Some are primarily motivated by external pressures, such as funder reporting requirements, while others have a genuine interest in quantifying their accomplishments and using evaluation to help the organization make data-driven decisions. Further, some organizations may want to collect performance information but have no idea where to begin or limited internal capacity to do so. Technical assistance providers need to clearly understand the starting point for agencies, as well as where they want to go and for what purpose. Answers to these questions will help the technical assistance provider better guide the organization to develop a plan with maximum potential for implementation. Ultimately, the technical assistance provider should seek during the time of his or her assistance to help the organization develop the data collection tools and establish the strategies and mechanisms for continuing the evaluation efforts after the assistance ceases.

8. Understand that evaluation efforts, including the timeline for development, need to be tailored to the unique characteristics of each nonprofit; there's no such thing as a "one-size-fits-all" model.

Each of the four EOR agencies started and ended at a different place over the course of the initiative. Each experienced varying degrees of focus and progress, and each applied different levels of effort based on the unique circumstances facing their organizations—some of which could have been expected, and others that were unanticipated. This suggests that technical assistance providers need to have a flexible and adaptable approach to working with agencies. Some agencies may desire a more hands-on, structured approach, while others may only wish to request assistance for specific activities. As suggested in the prior recommendation, it is helpful to understand from the outset the agency's end goal to begin to anticipate the length of time necessary to assemble the right components, including factoring in time for trial and error. Ultimately, however, the technical assistance provider is only a coach; the nonprofit organization needs to claim ownership and responsibility for implementing and sustaining whatever strategy is determined to be the best or appropriate fit for the organization.

9. Articulate and agree upon clear, realistic goals and expectations at the start of the assistance program. Maintain flexibility to adjust the assistance provided to respond to changing circumstances and the needs of the nonprofit.

The EOR Initiative laid out an ambitious program of technical assistance to be achieved over the course of the two-year effort. While all four EOR agencies made notable progress in realizing the goals that were set out at the start of the effort, none were able to fully implement their evaluation plans during the course of the initiative. This does not represent a failure on the part of the EOR Initiative or the four nonprofit agencies, however. Rather, it is an acknowledgement of how difficult it is to establish a genuine, comprehensive evaluation culture in nonprofit organizations that already face many challenges in implementing and managing complicated programs that serve troubled populations. Further, we remain hopeful that the agencies will continue to build upon the progress they have made thus far.

About midway through the initiative, it became necessary to reassess progress and to redefine aspects of the technical assistance program. Without this reassessment, the agencies likely would have accomplished much less in developing and executing their evaluation plans. One key change made was introducing more explicitness into the technical assistance activities, such as asking the agencies to write a step-by-step description of their data analysis plans. From this experience, we learned that having very clear and precise goals and objectives was key to the successful delivery of the technical assistance program.

The East of the River Initiative has helped build greater awareness and appreciation of what it takes to develop, implement, and support monitoring and evaluation activities for youth-serving nonprofits. The many lessons detailed throughout this report offer insights to funders that may wish to emulate this capacity-building model in other agencies and to nonprofit organizations that wish to more systematically measure and communicate their contributions on behalf of clients served and to the larger community. Certainly, there is more to learn about how and under what conditions the evaluation enterprise can be best nurtured and sustained in nonprofits.

Resources List

Outcome Indicators Project

http://www.urban.org/center/cnp/projects/outcomeindicators.cfm

Provides a framework for tracking nonprofit performance by suggesting candidate outcomes and outcome indicators for nonprofit organizations seeking to develop new or improved outcome monitoring. The three major components are

Building a Common Outcome Framework to Measure Nonprofit Performance
Outcomes and Performance Indicators for 14 Specific Program Areas
Nonprofit Taxonomy of Outcomes

Urban Institute Series on Outcome Management for Nonprofit Organizations

http://www.urban.org/center/cnp/projects/outcomeindicators.cfm

Key Steps in Outcome Management

Covers the necessary steps for nonprofit organizations that wish to implement outcome management and includes guidance on establishing an outcome-oriented measurement process and practices for using the information internally.

Finding Out What Happens to Former Clients

A guide to tracking clients that offers step-by-step procedures, model materials (including planning tools and feedback forms), and suggestions for keeping costs low.

Surveying Clients about Outcomes

A detailed guide intended to encourage the use of client surveys to measure service outcomes routinely, from pre-survey actions to questionnaire development and implementation.

Analyzing Outcome Information

A guide suggesting ways to extract information from outcome data with the goal of using the analysis to help improve services for clients and to ensure better future outcomes.

Developing Community-wide Outcome Indicators for Specific Services

Focusing on how local community funders and service providers can work together to develop a common core set of indicators, based on lessons learned from an experiment in Montgomery County, Maryland.

Using Outcome Information

A guide focusing on internal uses of outcome data and reviewing some important external uses—informing clients, volunteers, board members, services users, or donors and funders.

Other

Performance Measurement: Getting Results, 2nd edition, by Harry Hatry (Urban Institute Press, 2007)

Traces development of performance measurement by identifying its scope and limitations, describing each step of the process, explaining important issues about data analysis and reporting, and addressing other common concerns such as quality control of findings and personnel training.

Survey Questions: Handcrafting the Standardized Questionnaire, by Jean Converse and Stanley Presser (SAGE Publications, 1986)

Provides advice on designing survey questionnaires, by exploring how questions "behave" as well as discussing pretest and pilot work.

Evaluation: A Systematic Approach, by Peter Rossi and Howard Freeman (SAGE Publications, 2004)

Lays out the basics of the research involved in evaluating social programs. The goal of the authors is to increase technical competencies and broaden outlooks in the field, with particular care to outline the importance of political constraints and social dynamics in executing successful evaluations.

Measuring Performance in Public and Nonprofit Organizations, by Theodore Poister (Jossey-Bass, 2003)

A guide for public and nonprofit organizations to accurately measure outputs, efficiency, and productivity, as well as to use the resulting data to strengthen decisionmaking and improve agency and program performance. Approaches performance measurement holistically, recognizing that most effective measurement systems function in conjunction with other processes such as planning and budgeting.

Organizational Performance and Measurement in the Public Sector, edited by Arie Halachmi and Geert Bouckaert (Quorum Books, 1996)

A collection of articles relating successful performance measurement to budgeting, auditing, and policymaking, representing different views from the United States and abroad.

Guidebook for Performance Measurement, by Patricia Lichiello (Turning Point, 1999)

A guide to the fundamentals of performance measurement in public health, including the key components of developing a measurement process and strategies used by public health practitioners in the public and private sectors.

Measuring Program Outcomes: A Practical Approach (United Way, 1996)

A step-by-step manual for health, human services, and youth- and family-serving agencies. Explains how to identify outcomes, develop indicators and data collection methods, analyze findings, and use outcome information through examples, anecdotes, worksheets, and an extensive bibliography. An additional *Measuring Program Outcomes Training Kit* includes further notes, materials, and multimedia presentations.

Notes

1. The White House, "President Obama to Request $50 Million to Identify and Expand Effective, Innovative Non-Profits," press release, http://www.whitehouse.gov/the_press_office/President-Obama-to-Request-50-Million-to-Identify-and-Expand-Effective-Innovative-Non-Profits/.

2. Jennifer Comey, Eshauna Smith, and Peter Tatian, *On the Road to Adulthood: A Databook about Teenagers and Young Adults in the District* (Washington, DC: The Urban Institute, 2009). This report is available at http://www.urban.org/url.cfm?ID=411896.

3. In addition to the assistance provided by the Urban Institute, each organization participated in an assessment to identify and address organizational management needs from a technology perspective. In fall 2007, Community IT Innovators was contracted to provide IT assistance and recommendations for agency data tracking, reporting needs, and software recommendations.

4. A final report documenting this experience, "Strategic Communications Planning for the Nonprofit Sector," will be released in fall 2009.

5. Jinsong Chen, Asi Saeed Memon, and Cynthia Skinner, "Evaluation of Urban Alliance's High School Internship Program," 2008.

6. Comey, Smith, and Tatian, *On the Road to Adulthood.*

7. For more on the National Neighborhood Indicators Partnership, see http://www.urban.org/nnip.

8. Alana Conner Snibbe, "Drowning in Data," *Stanford Social Innovation Review,* 2006, http://www.ssireview.org/articles/entry/drowning_in_data/.

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