TEXAS HISTORICAL COMMISSION

REAL PLACES TELLING REAL STORIES

Grant Evaluation: Setting Goals and Measuring Impact

Welcome!

The webinar will begin at 2:00 p.m. CT.

While you wait:

1. Download PDFs of the slides and handouts under the "Handouts" tab of your control bar.

2. Confirm that your speakers are turned on and your audio is working by doing a sound check in the "Audio" tab of the control bar. Having problems? Exit and restart the webinar, or switch to "phone call" for a phone number and access code to hear the audio through your telephone.

The Museum Services Program provides support, resources, and training to museums in Texas.

- Consultations
- Webinars and workshops
- Resources

www.thc.texas.gov/museum-services

On our webpage:

- Webinars

- Workshops

- Grants and Fundraising

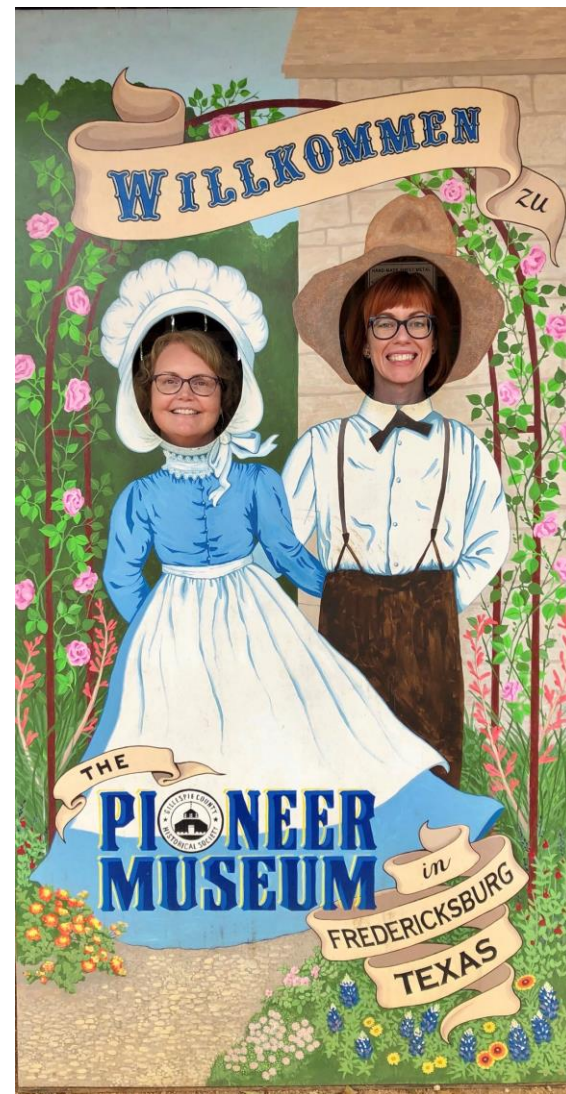- Helpful Resources

- Connect and Learn

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www.thc.texas.gov/awards

- Applications due July 31

- Recognizes an individual or institution in the museum field for significant achievement in the areas of historical interpretation, museum education, conservation of collections, and/or community involvement

- Recipient receives monetary stipend for their museum

www.thc.texas.gov/museumwebinars

- Building a Collaborative Online Archive: A Case Study
  - Wednesday, August 5, 10:00 a.m. CT

- Best Practices for the Nonprofit World
  - Wednesday, August 19, 10:00 a.m. CT

Upcoming Free Webinars from Other Orgs

www.thc.texas.gov/museumconnections

- *Aligning Nonprofit Management Teams and Boards During a Crisis*, July 23, 1:00 p.m. CT, Blue Avocado

- *Moving from Statements to Action: How Museums Can Catalyze Their Organizational Equity Journey*, July 23, 2:00 p.m. CT, Cultural Competence Learning Institute

- *Results Presentation: Task Force to Study an Education-Related Core Document*, July 28, 12:00 p.m. CT, AAM EdCom

- *Digitization Equipment Selection*, July 28, 1:00 p.m. CT, CCAHA

- *Faith in a City: Exploring Local Religious Groups through a Community Museum*, July 28, 1:00 p.m. CT, NEMA

- *Access for All: Celebrating 30 Years of the Americans with Disabilities Act*, July 29, 1:00 p.m. CT, MAAA

- *Reflections on Racism, Unrest, and the Role of the Museum Field*, July 29, 3:00 p.m. CT, VSA

- *Real Fake News: On Democracy and Media in Crises*, July 30, 9:00 a.m. CT, ICSC

- *Working with Teens During COVID-19*, July 30, 1:00 p.m. CT, NAEA Museum-Ed Division

Texas Historical Commission
REAL PLACES TELLING REAL STORIES

Anjali Kaul Zutshi

Grant Evaluation – Setting
Goals and Measuring Impact

Welcome!

About the Friends of the Texas Historical Commission

WHAT WE WILL TALK ABOUT TODAY

- The "Why" of evaluations
- The funders' perspective
- Measuring what matters – talking about outcomes versus outputs
- Where does evaluation fit in the grant writing process?
- Developing an evaluation plan for your grant and answering questions about evaluation
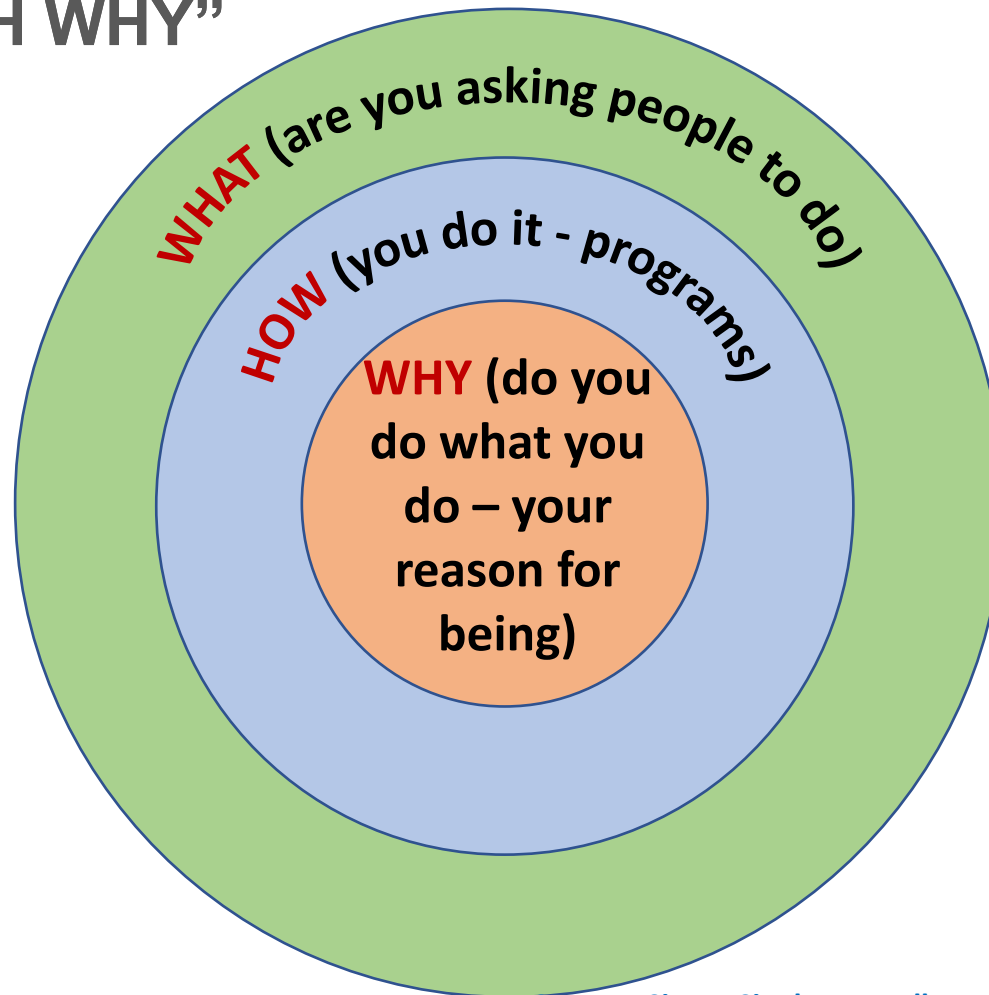
POLL

How would you describe your primary job responsibility within your organization?

"START WITH WHY"

WHAT (are you asking people to do)

HOW (you do it - programs)

WHY (do you do what you do – your reason for being)

Source: Simon Sinek, TED Talk – How Great Leaders Inspire Action

Grant Evaluation – Setting Goals and Measuring Impact
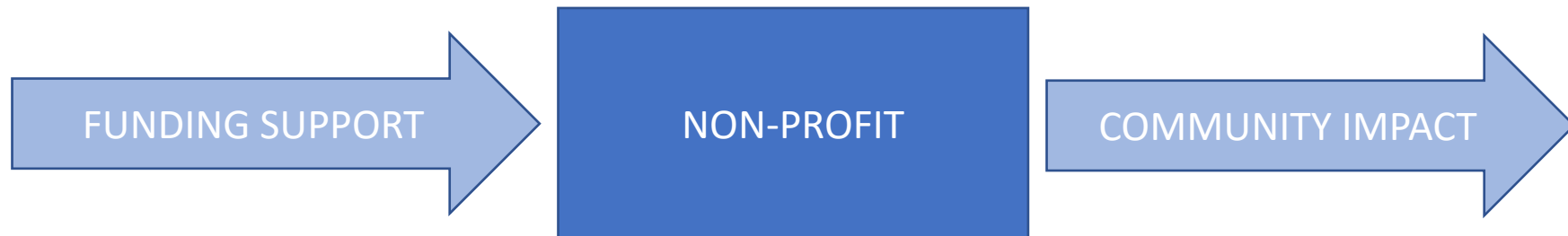
July 22, 2020

BUT…..

- How do you know that your program is addressing the need that you are trying to address?

  AND

- How will the funder know that you have had the impact?

THE FUNDERS' PERSPECTIVE

- Have money
- Want impact in the community they serve
- A strong funding partner

FUNDING SUPPORT → NON-PROFIT → COMMUNITY IMPACT

Challenges

- Impact is indirect
- Measures of impact only as good as the data/info provided by the organization

QUESTIONS, QUESTIONS!

"State the specific goals and expected outcomes/success indicators of the requested project/program/organization, including how you plan to meet these goals and outcomes. Include a timeline for accomplishing your goals for the term of the grant request."

"How will you measure/assess the effectiveness of the program/project and intended outcomes?"

"What are the measurable outcomes your non-profit is expecting to achieve?"

QUESTIONS, QUESTIONS!

III. GRANT REQUEST IMPACT - GOALS, ACTIVITIES, AND PERFORMANCE MEASURES

GOALS: The individual goals of the particular project; not organizational goals (unless this is a General Operating grant request).	ACTIVITIES: What activities have you chosen to support or accomplish a particular goal?	OUTPUTS: What the activities produce – the direct, tangible project or project activities. These are often, but not always, quantitative measures (# of participants, # of sessions held, # of courses offered).	OUTCOMES: The benefits, impact, or changes in behavior, knowledge, skills, attitudes, and/or standing for participants after project activities are completed. This can be both short- and long-term. Sometimes goals or activities share one common outcome.	PERFORMANCE MEASURES: Which data/information will be collected to measure your outputs and outcomes and how will it be collected (e.g., surveys, test scores, media attention, longitudinal studies).

Goals should be related to specific grant request (project goals = project request, organizational goals = general operating grant)

GOAL #1	
Activities	
Outputs	
Outcomes	
Performance Measures	

Grant Evaluations

Kronkosky Charitable Foundation

HOME   ABOUT   GRANTS   RESEARCH   FAQS   PROGRAM AREAS   EVENTS   INITIATIVES

- □ AWARDED GRANTS
- □ APPLY FOR A GRANT
- □ GRANT EVALUATIONS
- □ SEARCH EVALUATION SUMMARIES

The mission of the Kronkosky Charitable Foundation is " To produce profound good that is tangible and measurable...". The Foundation therefore makes evaluation an integral part of the requirements for nonprofit organizations that receive grants.

Evaluation is the systematic process for gathering, analyzing and reporting information about a program or intervention for use in making decisions. Evaluation can have many purposes.

Evaluation may help an organization find out what is and is not working in its programs. The information collected can help an organization identify where changes are necessary in program activities so program goals can be better achieved. A key question for each program activity or intervention is "What is the expected progress or client change expected as the result of the efforts expended on the program activity?". The evaluation process gathers the information necessary to determine whether expectations are being met. Most importantly, if expectations are not met then a solid evaluation should provide information as to why expectations were not met.

The evaluation required by the Foundation in connection with its grants should be designed, first and foremost, to provide information that is useful to the grantee. The Foundation does not have proscribed criteria or methodology. Each grantee's evaluation is necessarily unique to its own programs and the evaluation questions it is asking. Our hope is that each grantee will understand the importance and usefulness of evaluation in assessing its effectiveness in achieving its program goals. We expect the evaluation results will be reviewed, discussed and assessed by the staff and board of each grantee. All too often, grantees develop evaluation reports to meet funder requirements and do not use the information in their own decision making. To be most useful, the evaluation process should be integrated into the day-to-day operating procedures of an organization and it must have staff buy-in. Like any good operating procedure, it must be developed with care,

The content of the browser window shows:

- **Organization Information** - A brief history of the organization, its current focus, and recent accomplishments:
  - A copy of the latest verification of tax-exempt status from the IRS
  - Certified audits for previous three years (if a young agency, send last fiscal year's financial statements and the most recently-filed IRS Form 990)
  - The organization's current operating budget and year-to-date financial statements
- **Market and Customers** - Current population served including socio-economic status, ethnicity, gender, age, and geographic location.
- **Project Description** - A statement of need for the proposed project and a description of how it will address that need
- **Targets and Outcomes** - Who will be served and what specific results are expected from the proposed activities and within what stated time period?
- **Key Individuals** - List of directors and corporate officers including profession, ethnicity, and gender, and names and qualifications of key staff involved with the proposed project
- **Financial Projections** - A project line item budget including income and expenses
  - The specific dollar amount requested from the Foundation and date payment is needed
  - A list of all entities asked to give financial support to the proposed project (include their responses to date and dollar amount committed)
  - Financial support for the project after the grant period
- **Verification and Learning** - Plans to measure progress against expected outcomes
  - Include current or baseline levels, if available
  - Describe program data to be collected and how it will be used to improve the program
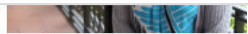
Progress reports on goals and expenditures of grant funds are required of all grantees.

Grants staff is available by phone or email to respond to inquiries at any time and may schedule pre-grant interviews with applicants as time permits.

After receiving an application, a face-to-face meeting may be scheduled as needed.

Please send grant email correspondence to WebGrants3003@mfi.org and postal correspondence to:

Grants Administration Department
The Meadows Foundation
3003 Swiss Avenue
Dallas, Texas 75204-6090

Sidebar captions:
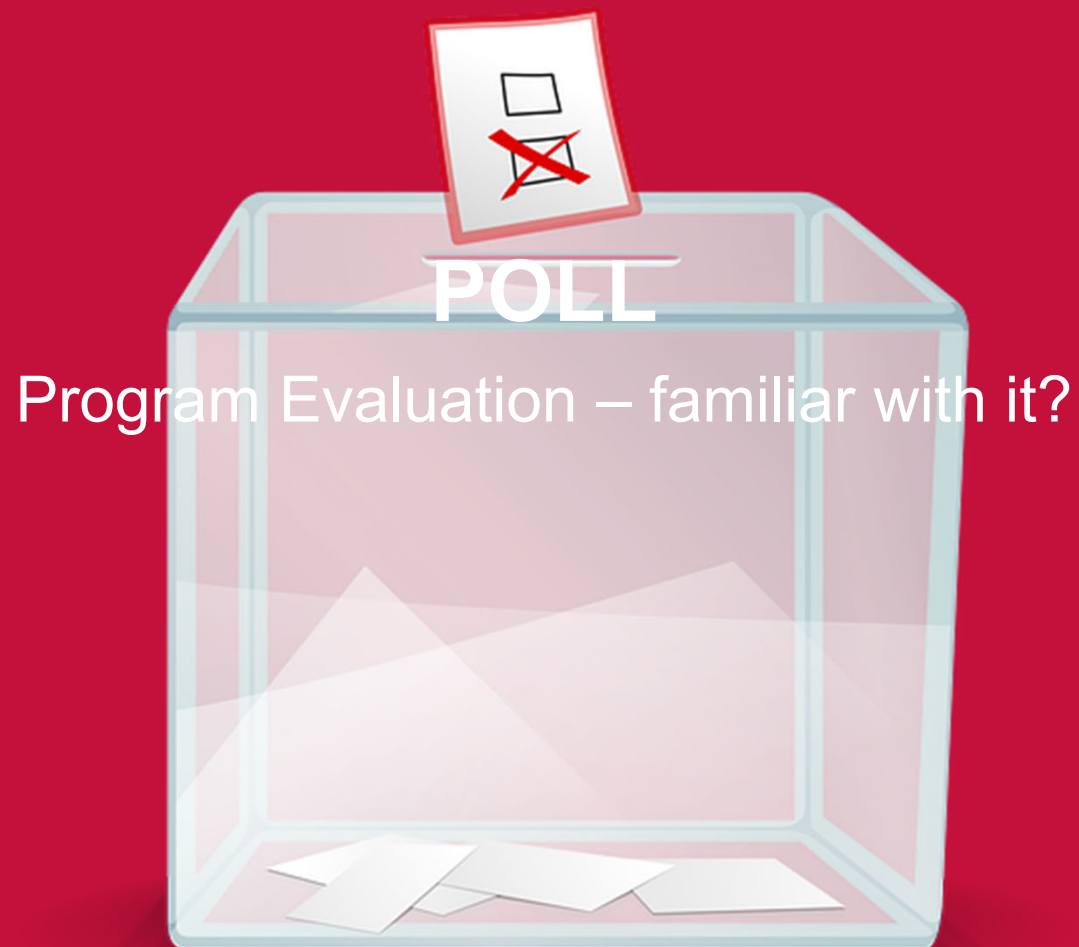- The University of Texas at Brownsville — *View My Story*
- Letot Center — *View My Story*
- New Hope Housing — *View My Story*

Incorporating Evaluation Planning in Your Grant Writing

Grant Evaluation – Setting Goals and Measuring Impact

July 22, 2020

POLL

Program Evaluation – familiar with it?

ASSESSMENT vs. EVALUATION

ASSESSMENT	EVALUATION

▪ A Measurement Tool
▪ Non-judgmental
▪ Ongoing
▪ Answers questions like:
    ○ How much did they learn?
    ○ How well did they learn it?
    ○ How well was it taught?
	▪ A judgment tool
	▪ Two strategies:
	    ○ Summative
	        • Final
	    ○ Formative
	        • Ongoing

The Purpose of…

ASSESSMENT	EVALUATION

■ A Measurement Tool
■ Non-judgmental
■ Ongoing
■ Answers questions like:
   ○ How much did they learn?
   ○ How well did they learn it?
   ○ How well was it taught?
	■ A judgment tool
	■ Two strategies:
	   ○ Summative
	       • Final
	   ○ Formative
	       • Ongoing

POLL

In your organization, what is the level of collaboration between program staff and development staff?

PROGRAM EFFECTIVENESS – QUESTIONS TO ASK

NEED	INTERVENTION (PROGRAM)	EVALUATION QUESTION(S)
For increased civic discourse and engagement amongst community members	An established and stable public television channel with new content focused on civic issues	- To what extent does our content drive audience members to take civic action? - What types of content are most effective? - Which audiences take civic action? Which don't?

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Families with preschool to early elementary children need help with reading	A volunteer-led supplemental literacy program in public preschool classrooms	- To what extent does participating in Program A contribute to the development of early literacy skills?

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Families with preschool to early elementary children need help with reading	A volunteer-led supplemental literacy program in public preschool classrooms	- To what extent does participating in Program A contribute to the development of early literacy skills?
Large immigrant population seeking TX history education	A fortnightly evening TX history speaker series at the museum	- To what extent does attending the talks/ presentations engage the target population?

REMEMBER THAT…..

- Evaluation is the process you will use to determine the worth or value of the program or activity you are requesting funding for
- Need to articulate the focus of the evaluation
  - What will be evaluated?
  - Purpose – why are you evaluating?
  - Who will be involved in or effected by the evaluation?
  - What environmental aspects will effect the evaluation?

REMEMBER THAT…..

EVALUATIONS AND GRANTS

- What is the critical need in your "community" that you must address – How much investment is needed and for what? Why now?

- How are you going to address the need? What program or "intervention" will you implement?

- Clear programmatic goals – what is your vision of the change you seek by implementing the program?

- Specific objectives - What outcomes are expected?

SETTING GOALS AND OBJECTIVES

- Goals – broad statement of what you wish to accomplish
  - Big and broad
  - Visionary
  - Linked to the needs statement
  - Intangible/abstract
  - Hard to measure

- Specific objectives – steps to take towards accomplishing the goal
  - Narrow and precise
  - Tangible
  - Measurable
  - S.M.A.R.T (Specific, Measurable, Achievable, Realistic, Timebound)
  - Will help define the specific tasks/action steps

SETTING GOALS AND OBJECTIVES

Program: A volunteer-led supplemental literacy program in public preschool classrooms.

Goal: Improve the early literacy skills of 3 to 6-year olds (pre-k to 1st grade) in community X.

Objective:

- The reading comprehension of participating students entering 2nd grade will be 35% higher than non-participating students

Evaluation methods/measures: Net enrollment increase of participating students per each age group per year; Tracking the increase in the # of tutors assigned to each age group; implementing an entry level reading comprehension evaluation for all 2nd grade students; parent and teacher testimonials

PURPOSE DEFINES TYPE

- **Formative**
  - Assessing, improving, or developing ongoing program and associated activities
  - Analyzes effectiveness of program tools and processes
  - Begins during project development and continues through implementation
  - May provide insights to improve the outcome of the program
  - Typically internal

- **Summative**
  - Judge the worth or impact of the program at the end (feedback, testimonials) – the quality and success
  - Focus is on the outcome
  - Takes place after the completion of the program
  - Typically external

PURPOSE DEFINES TYPE

- Formative
  - Assessing, improving, or developing ongoing program

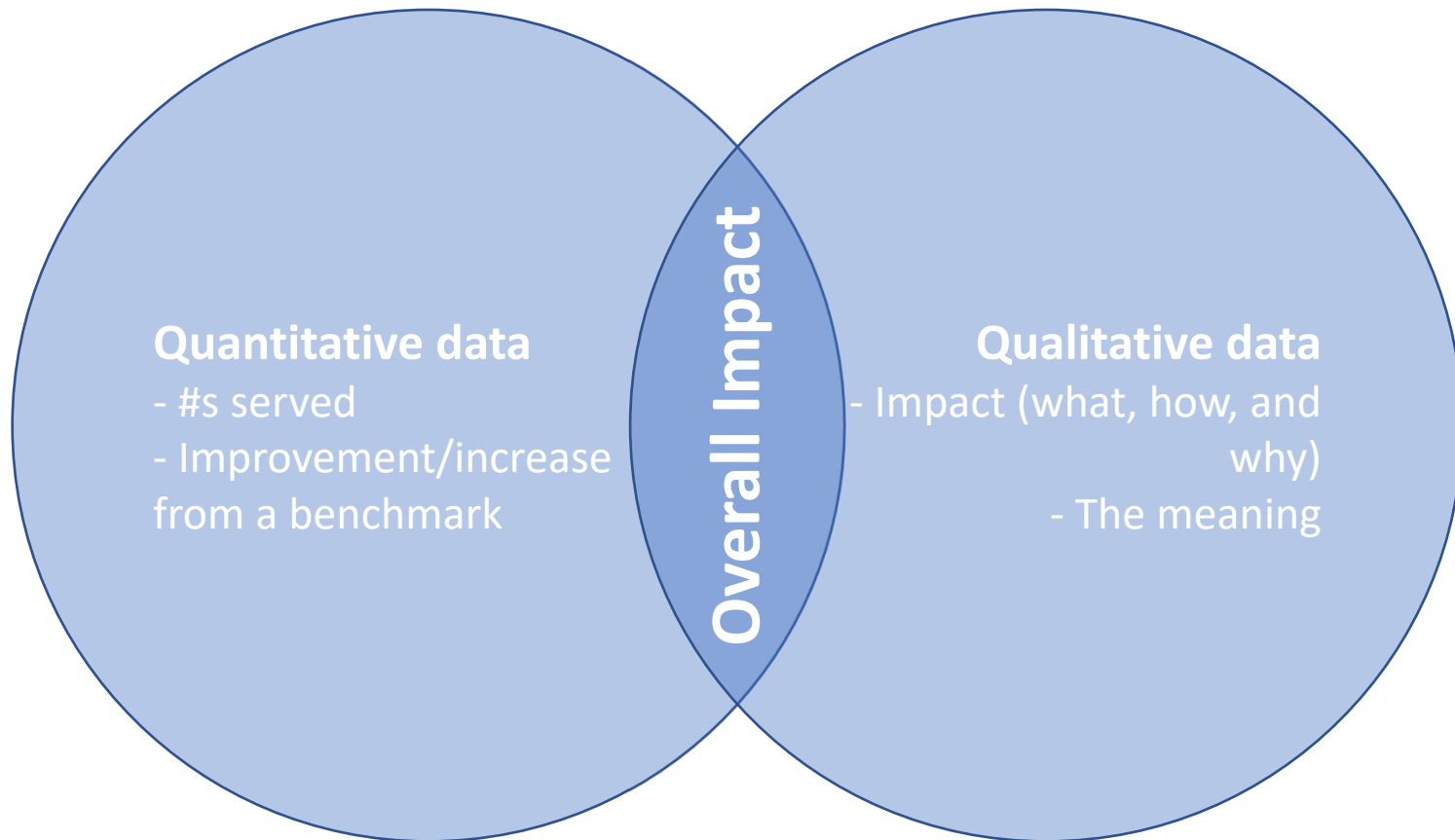   **Summative Evaluation**   **Formative Evaluation**

- Su

    Mmm, tasty.   Needs salt.   end

QUESTIONS DEFINE METHOD

- Choose the right method to answer your questions

Quantitative data
- #s served
- Improvement/increase from a benchmark

Overall Impact

Qualitative data
- Impact (what, how, and why)
- The meaning

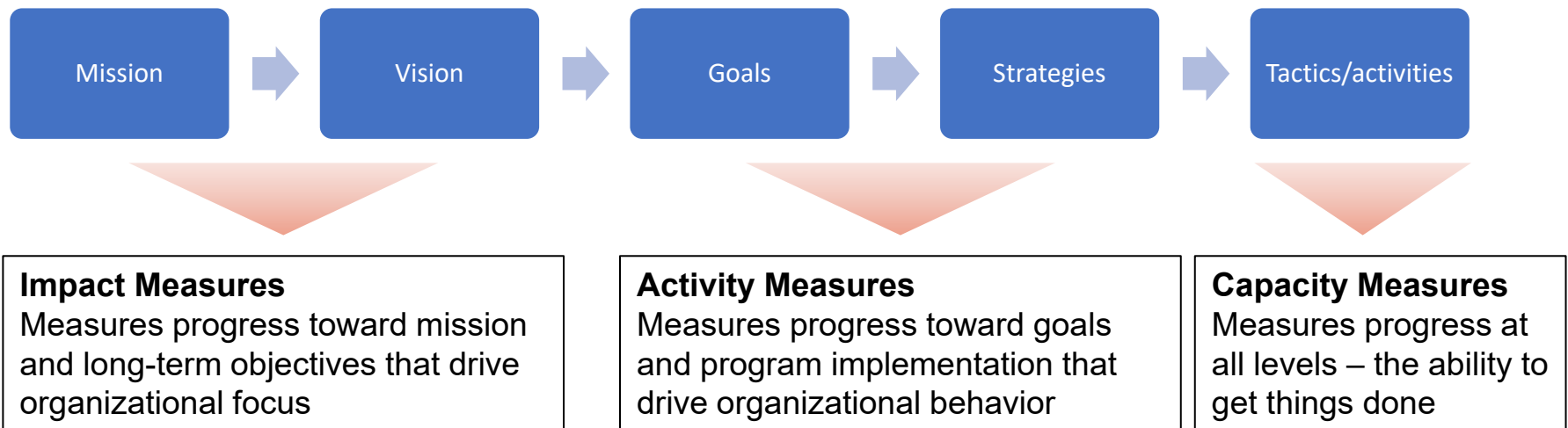## DESIGNING THE EVALUATION – QUESTIONS TO ASK

- **What is the purpose** of the evaluation?

- **How will you use** the findings?

- **What will you know** after the evaluation that you didn't know before?

- **What will you do** as a result of the evaluation that you couldn't do before because you lacked the relevant information?

- **How will the program better serve** the clients/community?

THE EVALUATION PLAN - COMPONENTS

- Formative or summative?
- How will you review your projects and programs?
  - What changes should we expect to see?
  - What are the measures? Data collection strategies?
  - How will you document?
- Qualitative vs. quantitative data
  - Tie in with objectives
  - Use anecdotes, gather testimonials
- Do you have all the necessary processes in place to measure?
  - Show preparedness
- Who will conduct the evaluation?
  - Internal vs. external
- Measure outcomes, not output
 - Funders want to see impact, not just effort

TEXAS
HISTORICAL
COMMISSION
REAL PLACES TELLING REAL STORIES

FRIENDS
OF THE
TEXAS
HISTORICAL
COMMISSION

MEASURE WHAT MATTERS – OUTCOMES vs. OUTPUTS

- $s raised, visitors to the site, students served through school trips, acres of habitat preserved - output

- Metrics like success in mobilizing resources, effectiveness of programs in addressing the need, progress in fulfilling mission - outcomes

Mission → Vision → Goals → Strategies → Tactics/activities
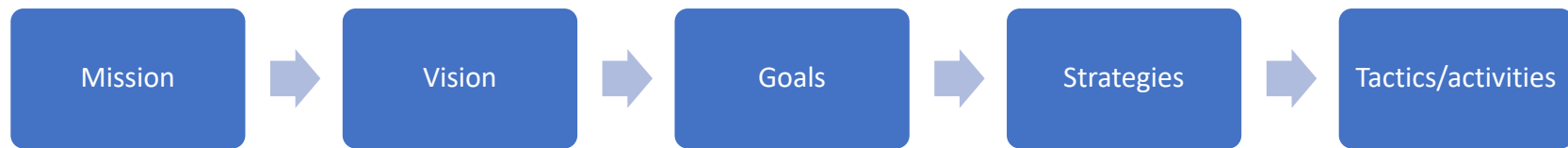
Impact Measures
Measures progress toward mission and long-term objectives that drive organizational focus

Activity Measures
Measures progress toward goals and program implementation that drive organizational behavior

Capacity Measures
Measures progress at all levels – the ability to get things done

Source: *Measuring what matters in nonprofits*, by John Sawhill and David Williamson

COMING BACK TO THE QUESTIONS ASKED…..

"How will you measure/assess the effectiveness of the program/project and intended outcomes?"

National Main Street Center (NMSC) manages all applicant registrations and tracks attendance at each major event during the conference (general sessions, receptions, opening and closing plenaries, etc.). A key goal for the Main Street Now conference is to expand the diversity of attendees (demographic and geographic). Beginning in December, the National Main Street Center will begin to monitor expected attendance based on registration, which includes geographies and demographic information, in order to measure our achievement of this goal. Tools such as scholarships (as available) and targeted outreach may be leveraged to ensure the conference is accessible to the widest possible audience.

During and post-conference, NMSC conducts pre and post analysis internally to determine level of interest of attendees on venue, education topics, and other specifics.   Surveys are collected throughout the conference to provide attendee feedback, with a final survey sent to all attendees upon the conclusion of the conference. Future conference planning is informed by this feedback and analysis.

COMING BACK TO THE QUESTIONS ASKED....

III. GRANT REQUEST IMPACT - GOALS, ACTIVITIES, AND PERFORMANCE MEASURES

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Goals should be related to specific grant request (project goals = project request, organizational goals = general operating grant)

GOAL #1	Increase the number of Preservation Scholars from three-four (3-4) in the summer of 2019 to six (6) in 2022, placed one in each of THC's six divisions.
Activities	- Build awareness about the Texas Historical Commission's mission and scope of work across the state, especially amongst college students interested in history, or in potential careers in academia or public history - Expand the pool of potential candidates by expanding the understanding of the various specializations required in the historic preservation field
Outputs	- Outreach to college students studying in Texas colleges or universities, or students from Texas studying outside of the state - Attend college presentations and career fairs, to showcase the breadth and depth of THC's programs and projects, and the academic background, skills and experience required to effectively implement these programs and projects
Outcomes	- Students from traditional (history, archeology, anthropology, architecture, etc.) backgrounds as well as from non-traditional (economics, community and regional planning, finance, marketing, graphic design, etc.) apply for the FTHC Preservation Scholarship. - Preservation Scholars actively work on research and content development for programs like the *Undertold Markers* Program, or the *Town Square Initiative* and *Main Street* Programs, enriching the historical narrative shared by THC.
Performance Measures	- Number of applicants for the Summer 2019 Preservation Scholars Program - Number of graduating Preservation Scholars (past and future) that choose careers in historic preservation. Data will be collected from past alumni of the program, as well through exit interviews/reports from 2019 and future graduates of the program.
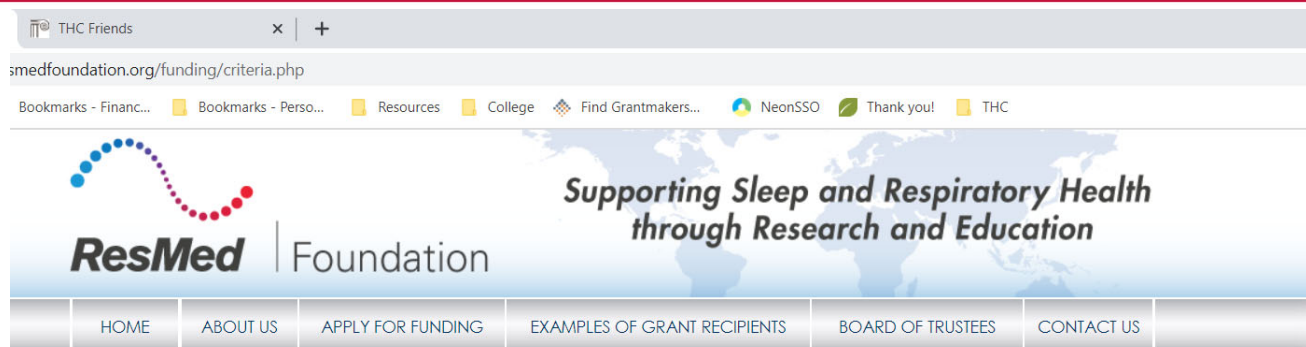
Apply For Funding: Proposal Evaluation Criteria

PROPOSAL EVALUATION CRITERIA

» Clinical Research Proposals

» Physician and Public Awareness
Proposals

» Community Philanthropy
Proposals

» Proposal Evaluation Criteria

» Apply Online

The criteria for funding are consistent for all grant types, except where specifically noted.

NOTE FOR CLINICAL RESEARCH GRANTS: Reviewers will look at the quality of the science with specific attention as to whether the study has the potential to make a significant difference in furthering the understanding and advancement of the treatment and management of sleep disordered breathing.

GENERAL CONSIDERATIONS

- What will be achieved?
- What are the chances that the achievement will happen?
- Is this the best possible use of money to achieve the desired results?
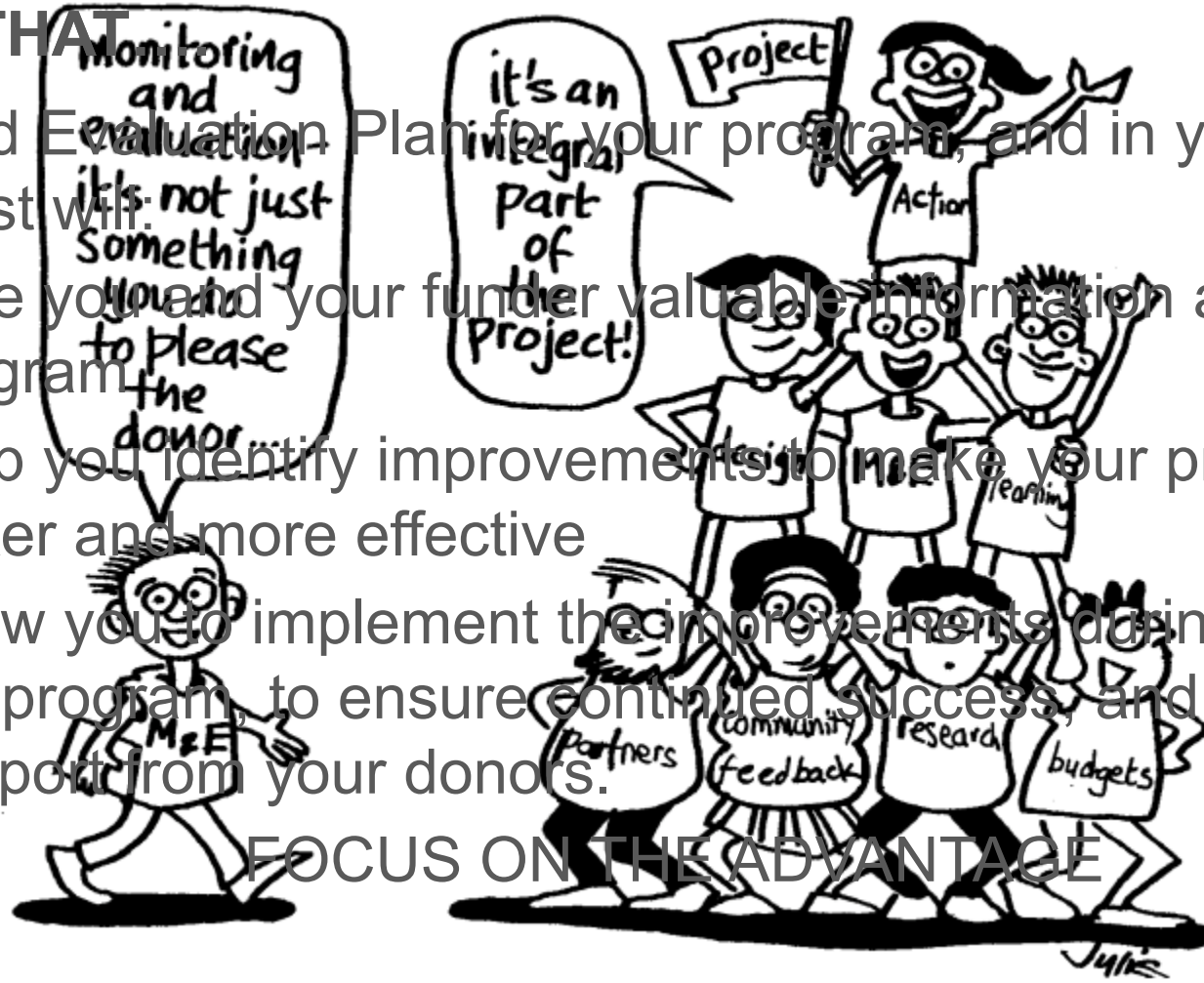
SPECIFIC CRITERIA

1. Completeness of Application
    a. Objectives of organization are realistic and appropriate
    b. All requested items included with application

2. Does the project help fulfill the mission of the ResMed Foundation?
    a. What will the project achieve?
    b. Are there long term benefits?

3. Needs/Goals/Objectives
    a. Are needs realistically addressable by the proposed program?
    b. Does this program provide solutions that are not provided by other organizations?
    c. Is the organization seeking appropriate collaborations to increase the
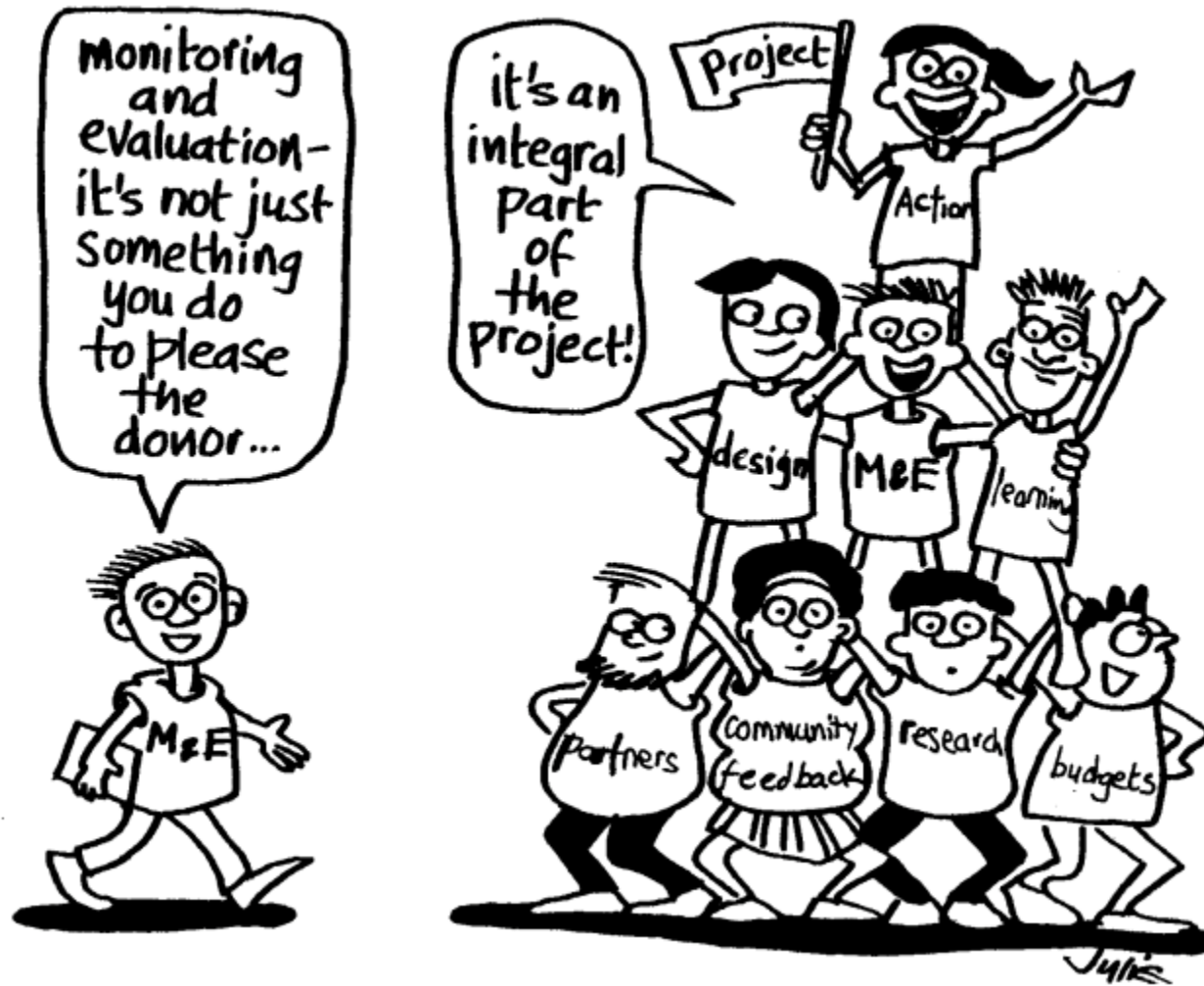
KNOW THAT

A good Evaluation Plan for your program, and in your grant request will:

- Give you and your funder valuable information about the program
- Help you identify improvements to make your program better and more effective
- Allow you to implement the improvements during and after the program, to ensure continued success, and continued support from your donors.

FOCUS ON THE ADVANTAGE

QUESTIONS?