

A photograph of two women in a meeting. The woman in the foreground, with brown hair and a brown top, is smiling and has her hands raised in a gesture. The woman in the background, with dark hair and a red top, is partially visible. The image is overlaid with a decorative wavy line pattern.

## ➔ FACTSHEET 13

# Evaluation and sustainability



**A**s you begin to develop your group you will need to start considering a number of wider issues that are impacting the non-profit/voluntary sector. Two of these are:

## Evaluation

the growing demand on organisations to clearly demonstrate their benefit and the positive results of their projects and campaigns.

## Sustainability

the need to ensure the long-term future of the group with financial stability and limiting any negative impact on the wider environment

## Evaluation

There is a strong and growing culture of evaluation in organisations in the charity sector. Financial supporters, grant-giving organisations, government and the media are increasingly pressing for proof of impact and value for money. Also evaluating your own projects and strategies is vital as you seek to find out what works and why and to improve the efficiency and impact of any of your activities.

However constant evaluation can be a challenge, as you will usually want to be devoting your time, energy and money into achieving your key objectives rather than checking on your performance. Sometimes evaluation can be side-lined by people within the group as they may not be too keen on reading the results!

From the onset of your group it is best to start a culture of evaluation so this is not perceived as an imposition or threat later on in the group's life. Ensuring that everything you do is transparent and open to improvement will help develop a dynamic organisation that can really make a difference.

Evaluation is needed even when your group is small as everyone needs to be able to reflect on the impact of what they do. However, the techniques and processes used will be different according to the size of the group, and a variety of particular needs.

Evaluations can be performed on:

## Process:

The development and implementation of any particular programme you run. For example, have you hit your targets as planned? This is normally done at the end of a programme and looks at the project from start to finish. This involves asking questions about how the project could be continued, improved, changed or even stopped.

## Outcome:

The changes that have happened as a result of anything that the group has done. Where a process evaluation may tell you that several hundred people were contacted directly during your advertising and awareness campaign, an outcome evaluation may be able to show how many people changed their behaviour (attending a clinic, becoming a financial donor etc.)

## Impact:

The long-term and broad changes that may have occurred following a programme (for example, reflected in governmental policy change, attitudes etc.)

These evaluations can be carried out when the time is right for your group. An impact evaluation may not be possible or achievable in the very early stages of you setting up your group, but process evaluations can be started in a simple way as soon as you get going.

**The US Joint Committee on Standard for Educational Evaluation** (<http://www.jcsee.org/>) defines four main principles that underlie good evaluation:

### Utility

Is your evaluation providing useful information that actually informs your decision making?

### Feasibility

Is your evaluation practical, cost-effective and viable?

### Propriety

Are you paying careful attention to legal and ethical standards to ensure that you consider everyone being evaluated and also those who may be affected by the results?

### Accuracy

Is your data accurate so that it is both useful and ensures the credibility of your group? This means having a rigorous evaluation plan, data collection and openness to report bad results as much as good results.





## Evaluation plans

As part of your three-year action plan (see Factsheet 3) it is important to consider how you will evaluate the group. Developing an evaluation plan is part of ensuring the quality and effectiveness of all your activities.

The questions you ask should always bring you back to how you are advancing your mission statement and key objectives. An evaluation plan helps you ask the right questions and also will establish a normal culture of evaluation and assessment within the organisation. It will also show any current or potential donors that you are serious about maintaining and building quality in your group and can provide you with valuable information to present to all your stakeholders about performance.

You do not have to be an expert to carry out a useful evaluation plan, and it is best to start small and gradually grow your evaluations as your group develops. The Free Management Library provides a useful step-by-step process in how to carry out an evaluation. (<http://managementhelp.org/evaluation/outcomes-evaluation-guide.htm>)

## Sustainability

A successful gynaecological cancer support and advocacy group usually starts small with a group of passionate and committed people. Such a group can be maintained in the short-term by the energy of individuals driving matters forward, but can only be sustained long-term when a number of other key building blocks are in place. These include:

- Ensuring your key objectives and goals partner with financial stability. This will include putting in place a governance structure with elected individuals who have determined terms of service and terms of reference.
- Having a clear and compelling vision, that is constantly communicated by staff and stakeholders and that evolves over time.

Sustainability has been defined as, “Living in such a way that we can meet the needs of the present without compromising the ability of future generations to meet their own needs”.

It is often said that, ‘success is having successors’ so that the good work that you have started develops healthily into the future. Ensuring continuity, building a team and developing a sound financial platform are crucial for the long-term health and success of the group. Long-term financial stability is particularly important in the current climate of austerity and budget cuts.

**Some core principles in building a sustainable future include:**

## Ensuring financial sustainability:

Your key objectives must always be associated with financial goals. Do you have the ongoing resources to meet your objectives? Fiscal health and the maintenance of sufficient working capital could well be as important to your long-term success as your actual impact on the community you serve.

## Developing additional revenue streams:

For your group to grow long-term you must ensure income from different sources, particularly in the current climate of austerity and budget cuts. Time and effort should be spent in assessing where finances can be gathered and maintained.

## Building a viable business model:

All your activities must be brought under the umbrella of your mission statement (see Factsheet 4). All your key objectives need to be linked with financial targets – any sustainable group must have a dual 'bottom line' which merges your impact with financial returns.

## Continuing a culture of strong decision making:

Ongoing evaluation and assessment of all your key decisions are vital when living in an environment that is constantly changing.

## Maintaining succession planning:

This ensures that staff, leadership and committee members are sharing information and expertise within the group. This will minimise the negative impact when key individuals move on, and allows existing group members to be trained and ready to fill the gaps when they inevitably occur.

It is also well worth considering your environmental impact and sustainability as an organisation, as this may well be asked about by potential donors and partners.

As always, clear and effective communication of these issues is important so that the strong ethos of your group is projected out to your target audiences (see Factsheet 10).

## For more information

### Evaluation

There are a lot of online resources to help groups in evaluating their performance. Some useful resources include:

- **Non-profit Answer Guide:** A useful US site providing practical tips on how to use evaluation plans, minimise internal resistance to evaluation and give basic responsibilities of committee members. (<http://nonprofitanswerguide.org/faq/evaluation>)
- **Free Management Library:** A US site providing support and information for a range of topics focused on personal, professional and organisational development. (<http://managementhelp.org/evaluation/outcomes-evaluation-guide.htm>)

### Sustainability

- **Charity Finance Directors' Group:** A UK based guide 'Sustainability in Practice' to raise the issue of business and environmental sustainability among charities. Provides useful food for thought as your group develops (<http://www.cfg.org.uk/resources/Publications/~media/Files/Resources/CFDG%20Publications/Sustainability%20in%20Practice.ashx>)
- **The National Council for Voluntary Organisations:** This UK umbrella group (<https://www.ncvo.org.uk/>) provides a wealth of information and support for charities and voluntary organisations that may be transferable to other countries (<https://www.ncvo.org.uk/practical-support/funding/sustainable-funding>)