THE STATE OF EVALUATION

MEASUREMENT AND EVALUATION PRACTICES
IN CANADA'S CHARITABLE SECTOR

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INTRODUCTION

Increasingly, charities are being asked to demonstrate the impact of the programs and services they deliver. Beyond descriptions of the programs and services they offer, tabulations of the number of clients served, or stories about the organization's impact on individuals, organizational stakeholders (funders, board members, policymakers, members of the media, and individual Canadians) are hungry for information to help them understand how the charities they support are affecting both the populations they serve and the broader social, economic, and environmental systems they are embedded in.

Repeatedly during Imagine's work to help establish a new narrative for charities and the charitable sector, participants and informants told us that being able to demonstrate these types of impact is critical to successfully reshaping the charitable sector's conversation with Canadians.[1] However, during our day to day interactions with charity leaders, many (particularly those leading smaller charities) tell us they struggle to do this. This is not because they are not measuring and evaluating their work and it is certainly not because their work is not having an impact. Instead, they struggle with demonstrating impact as part of a broader set of challenges related to measurement and evaluation. Looking at the evaluation landscape, they see a diverse range of potential approaches and techniques they could apply, an even wider range of possible uses for the results produced, and an incredible diversity of stakeholders and audiences to engage with. Faced with a sometimes overwhelming range of potential options and demands, what charity leaders need is a common understanding with their stakeholders of what norms and expectations are reasonable for their organization and circumstances.

To help provide this needed perspective, we decided to conduct a survey of charities aimed at describing the current state of evaluation. The survey was conducted in mid-2018 using an online survey platform and collected 1,884 responses.[2] To increase the usefulness of results, we modelled it on previous work conducted by the Innovation Network in the United States. This report presents the results of that survey. A key focus is benchmarking current evaluation and measurement practices, including the aspects of their work charities are measuring and evaluating, the resources and techniques they are drawing on, and how they are using the results of their evaluation-related work. Another is exploring organizational enablers and barriers, opinions about the role of evaluation and measurement, human and financial resources drawn on by charities to evaluate their work, funder relationships, and the role of external evaluators.

The report presents top-line results and seeks to identify how the various aspects of evaluation and measurement are linked (e.g., how what charities measure correlates with how they use evaluation results). Throughout, the contrasts and drivers presented are those that are statistically significant at the .05 level. Because of the large number of respondents, results are presented by organizational characteristics such as size, sub-sector, and region where analysis indicates that these factors are statistically significant drivers. Collectively, we hope these results will aid charity leaders in identifying reasonable evaluation-related norms and expectations for their organization.

[1]http://sectorsource.ca/research-and-impact/narrative-tool-kit

[2]For more details, please refer to the methodology section at the rear of this report.

OVERVIEW

Through the State of Evaluation survey, we have learned:

96% of charities evaluate their work in some way.

Charities are most likely to evaluate the outputs, outcomes and quality of their work. When they evaluate their impact or the return on investment of their work, it is almost always in addition to evaluating one or more of these three more common aspects of their work.

Charities draw on a range of quantitative and qualitative methods and resources to evaluate their work.

Quantitative resources such as administrative data and statistical compilations of services delivered are most commonly used, particularly when charities are evaluating their outputs. Charities evaluating more involved aspects of their work, such as their outcomes or impact, are more likely to use rarer and more involved approaches, such as focus groups, logic models / theories of change, and case studies.
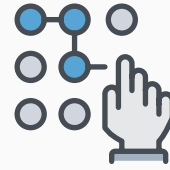
Charities use evaluation findings in many different ways.

The most common uses of evaluation findings are reporting (to Boards of Directors and funders or supporters) and tracking and better understanding program outputs and outcomes. Charities using results in these ways tend to focus on evaluating their outputs and outcomes using the most common methods and resources. Charities that use evaluation findings in less common ways, such as reporting to more specialized audiences or to support organizational decision making, tend to evaluate more involved aspects of their work and use more specialized measures.

External funding plays a significant role in evaluation.

Charities receiving external funding tend to allocate more of their budget to evaluation. While it is uncommon for external funding to include monies specifically for evaluation—just 20% of externally funded charities reported receiving dedicated evaluation funding— charities that receive this funding tend to evaluate more involved aspects of their work (such as their impact and return on investment) and to use more specialized evaluation methods. However, they do not seem to use evaluation findings differently.

A number of key enablers and barriers affect evaluation capacity.

The most important enablers are support from organizational leaders and buy-in from staff and stakeholders. Charities experiencing these key enablers are more likely to evaluate their impact, to use a range of more specialized evaluation measures, and to use evaluation results to communicate with less common audiences. The most common barriers are lack of staff time and financial resources, but while these barriers are commonly reported they do not seem to be associated with significant differences in what charities evaluate, the evaluation measures they draw on, or how they use results.

Overall, charities' opinions about evaluation are quite favourable.

Charities are moderately happy with their evaluation capacity, giving it an average score of 6.4 out of 10. Charities experiencing barriers are less satisfied with their evaluation capacity, as are organizations that place high priorities on fundraising and revenue generation, organizational governance, and communications and marketing at the expense of other areas. Solid majorities of charities see a need for evaluation to guide their work and believe the resources they devote to this end are well-spent. However, significant numbers highlight difficulty making full use of the data they collect.

25% of charities belong to some sort of formal or informal group, network or association related to evaluation.

Charities draw on these relationships for a range of supports, most commonly: measurement and evaluation tools, training, and being part of larger evaluation projects. Charities belonging to these networks tend to have greater evaluation capacity.

21% of charities report having at least one paid staff member primarily devoted to measurement and evaluation work.

For the remaining charities, evaluation is an additional responsibility that is frequently spread across multiple staff positions and most commonly falls to the Executive Director / CEO or program staff / volunteers. Unsurprisingly, charities with dedicated evaluation staff have significantly higher evaluation capacity.

22% of charities report having worked with an external consultant or organization in some capacity related to evaluation over the previous year.

While charities that work with external evaluators tend to be less satisfied with their evaluation capacity, they tend to actually demonstrate greater capacity—evaluating more involved aspects of their work and drawing on more sophisticated methods and resources. Overwhelmingly, charities that work with external evaluators are happy about their experiences with them.
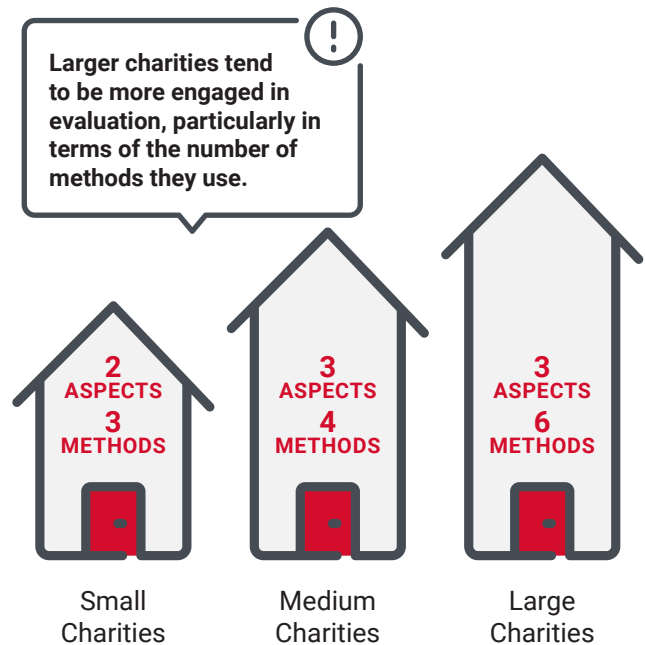
WHAT IS BEING EVALUATED AND HOW IS IT BEING MEASURED?

Because we knew many survey respondents might not be familiar with the technical terminology of evaluation (e.g., formative vs. summative evaluations), we instead asked respondents whether their charity measures or evaluates specific commonly recognized aspects of its work (e.g., outputs, outcomes, impact, etc.)[3], what methods or resources it draws on to do this and how it uses the results. *Charities evaluating at least one aspect of their work or using at least one identifiable measurement method or resource are defined as being engaged in some form of evaluation.*

By this measure, **96% of charities are engaged in evaluation.** The vast majority of charities are more engaged than the minimum of reporting a single aspect or measurement method (93% exceed this minimum)—the typical charity draws on four methods or resources to evaluate three aspects of their work.

Looking first at what they evaluate, charities are most likely to evaluate their outputs, outcomes, and quality. **90% of charities evaluate at least one of these aspects of their work and just under half (47%) evaluate all three.** They are much less likely to evaluate their impact or return on investment, and when they do so it is usually as a supplement to evaluating the three most common types of evaluation. Fully two thirds of charities evaluating their impact or return on investment also evaluate *all three* (i.e., outputs, outcomes, and quality).

LEVEL OF ENGAGEMENT IN EVALUATION BY CHARITY SIZE

Larger charities tend to be more engaged in evaluation, particularly in terms of the number of methods they use.

2 ASPECTS
3 METHODS

Small Charities

3 ASPECTS
4 METHODS

Medium Charities

3 ASPECTS
6 METHODS

Large Charities

In this report, small organizations are defined as those with annual revenues of less than $150,000, medium organizations as those with revenues between $150,000 and less than $5 million, and large organizations as those with revenues of $5 million or more.

ASPECTS EVALUATED

78%
64%
64%
33%
20%
5%
5%

- Outputs
- Outcomes
- Quality
- Long-term and/or systemic impacts
- Return on investment
- Other measure(s)
- None of these
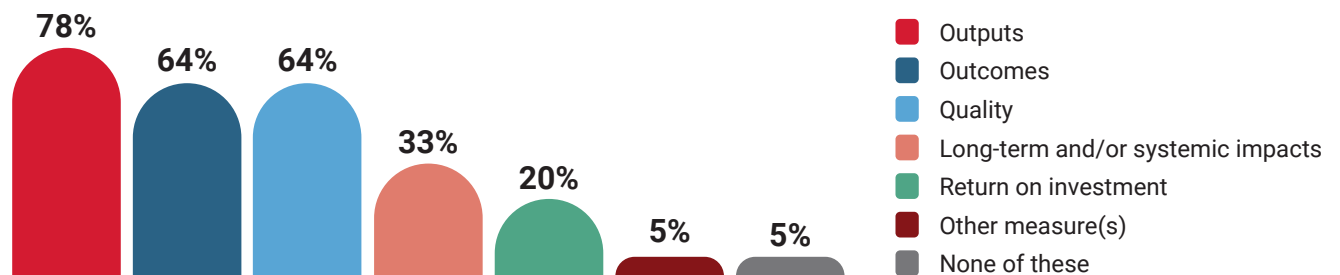
[3]*Outputs were defined as how much the organization did (e.g., the number of clients served, beds provided, workshops conducted, etc.), outcomes as the direct effects of the organization's work on the people or cause it serves, quality as how well the organization carried out its work, impact as broader long-term systemic effects of the organization's work beyond those directly served, and return on investment as comparison of the social or economic value of the organization's work with its costs.*

Charities working in particular sub-sectors tend to evaluate different aspects of their work. For example, Grant-making, fundraising & voluntarism organizations are less likely than average to evaluate their outputs (59%), but more likely to evaluate both their impact (39%) and their return on investment (26%). Similarly, while Arts, culture & recreation organizations are less likely to evaluate the outcomes of their work (55%), they are more likely to measure their return on investment (26%). Education organizations are more likely to evaluate both their outcomes (74%) and their impact (39%). Finally, Social services organizations are somewhat more likely than average to evaluate their outputs (84%), but less likely to evaluate their return on investment (16%).

The aspects of their work charities evaluate also tend to vary according to where in Canada they are located. Ontario charities are more likely than average to evaluate the return on investment (25%) of their work. Quebec charities, on the other hand, were somewhat less likely to evaluate both their outcomes (59%) and their return on investment (11%). Charities in Atlantic Canada, were also less likely to evaluate their outcomes (55%), impact (19%) and return on investment (16%), while charities in the Prairies were somewhat more likely than average to evaluate their outputs (87%).

Looking at how charities measure their work, quantitative methods or resources are somewhat more common than qualitative. **89% of charities use some form of quantitative measures and 62% use qualitative measures.**[4] When charities use qualitative measures, they tend to be supplements to quantitative methods —fully 96% of charities using qualitative methods used them together with quantitative methods. In contrast, about a third of charities using quantitative measures **do not** use qualitative measures.

ASPECTS MEASURED BY ORGANIZATIONS SIZE

Larger charities are more likely to evaluate all aspects of their work.

	Small	Medium	Large
Outputs	70%	82%	85%
Outcomes	56%	67%	79%
Quality	58%	65%	77%
Long-term and/or systemic impacts	33%	31%	42%
Return on investment	16%	21%	30%
Other measure(s)	4%	5%	9%
None of these	8%	3%	2%

[4]*For the purposes of this breakdown, administrative data, statistical compilations, surveys, web statistics, and experimental studies are considered quantitative measures. Interviews, focus groups, logic models / theories of change and case studies are considered qualitative. The remaining approaches were not considered definitively quantitative or qualitative. For definitions of these methods / resources, please refer to the Methodology section at the end of this report.*

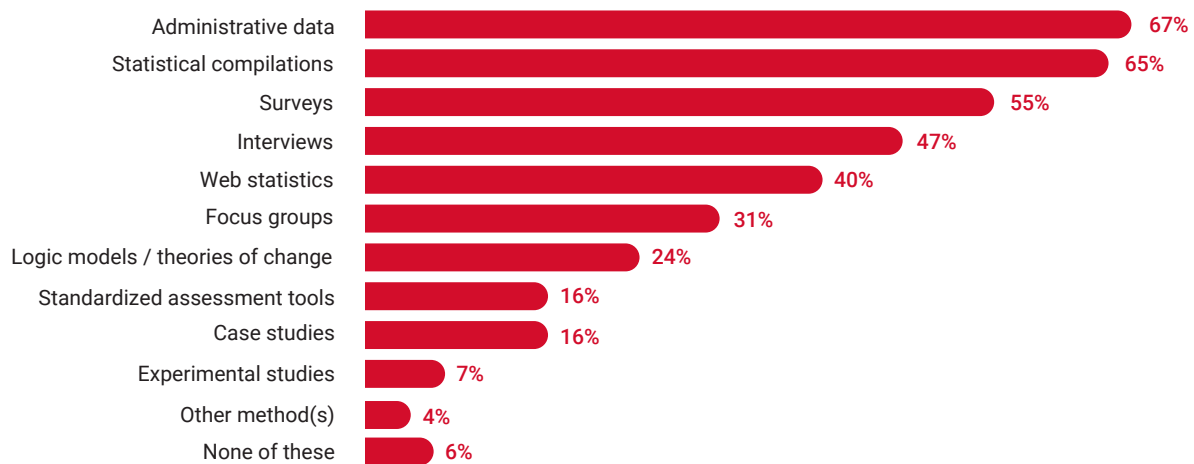## QUANTITATIVE AND QUALITATIVE METHODS BY ORGANIZATION SIZE

Use of both quantitative and qualitative methods increases with organization size.

Small Charities	82% quantitative	50% qualitative
Medium Charities	92% quantitative	66% qualitative
Large Charities	98% quantitative	86% qualitative

The most commonly used measures are administrative data, statistical compilations (tabulations measuring the volume of organizational activity), and surveys. Less commonly used measures tend to be more specialized and include experimental approaches, case studies, and standardized assessment tools. The measures charities use appear to be linked to the specific aspects of their work they evaluate. For example, charities that evaluate their outputs are somewhat more likely to draw on statistical compilations (75%) and administrative data (75%), while charities that evaluate their outcomes are more likely to draw on logic models / theories of change (32%), case studies (22%), and standardized assessment tools (22%). Some of the biggest differences are with charities that evaluate more involved aspects of their work. Charities evaluating their impact are substantially more likely to make use of case studies (28%), logic models / theories of change (37%), focus groups (43%), and interviews (63%). Interestingly, charities measuring their return on investment are more likely to draw on both qualitative [interviews (70%), focus groups (51%)] and quantitative (administrative data [82%], statistical compilations [76%]) measures.

EVALUATION METHODS

Method	%
Administrative data	67%
Statistical compilations	65%
Surveys	55%
Interviews	47%
Web statistics	40%
Focus groups	31%
Logic models / theories of change	24%
Standardized assessment tools	16%
Case studies	16%
Experimental studies	7%
Other method(s)	4%
None of these	6%

In terms of variations by organizational characteristics, Arts, culture & recreation organizations stand out as being more likely to use low intervention measures like statistical compilations (72%) and web statistics (55%), as opposed to sometimes more involved or labour intensive approaches like focus groups (25%), logic models (11%), or standardized assessment tools (4%). Health organizations, on the other hand, are more likely to use all of these more involved approaches [focus groups (37%), logic models (29%), and standardized assessment tools (29%)]. Education organizations are more likely to use surveys (66%), interviews (63%), and web statistics (61%), while Grantmaking, fundraising & voluntarism organizations are less likely to use statistical compilations (44%), surveys (43%), and logic models / theories of change (16%). With the exception of web statistics (29%), Social services organizations are about as likely as the typical charity to use particular evaluation methods.

HOW ARE CHARITIES USING THE RESULTS?

While charities generally use a fairly restricted number of methods to evaluate two or three aspects of their work, they apply the results of this work quite broadly (on average, charities used results in 9.2 ways). The survey asked respondents whether they used results in any of 18 distinct ways, falling into four major categories:

Stakeholder reporting / communications.
97% of charities use evaluation results to communicate with one or more groups, including their boards of directors, funders / supporters, those served by their organization, the public / media, peer organizations, funded or supported organizations, and/or government.

Organizational / program planning and decision-making.
94% of charities use the results of their evaluation to inform one or more aspects of planning and decision-making, including revising existing programs, developing new programs, developing / revising organizational strategies, and/or allocating the charity's resources.

Learning.
88% of charities use evaluation results to learn about one or more aspects of their work, including determining whether the original objectives of the work have been achieved, learning about the outcomes of the work, how it was implemented, and/or contributing to the overall knowledge of the field.

Organizational performance.
59% of charities draw on evaluation results to compare organizational performance to specific goals or benchmarks and/or to support more general assessments of organizational performance.

The most common specific uses for evaluation findings are reporting to the organization's board of directors and funders or other supporters, monitoring whether the original objectives of the work are being achieved and learning about its outcomes, and revising existing programs and supporting the development of new ones. The least common uses include sharing findings with peer organizations or seeking to contribute to the general knowledge of the charity's field, followed by assessing the general performance of the organization (without reference to specific benchmarks) and informing or influencing government.

USES OF EVALUATION RESULTS

Use	Percentage
Report to Board of Directors	88%
Report to funders / supporters	81%
Learning whether original objectives were achieved	71%
Revise programs or initiatives	70%
Support development of new programs or initiatives	67%
Learning about outcomes of work	65%
Plan / revise general organizational strategies	61%
Allocate resources	56%
Communicate with public / media	53%
Report to the people organization serves	53%
Benchmark organizational performance	43%
Learning from how initiatives were implemented	43%
Report to funded / supported organizations	36%
Report to senior management	35%
Share findings with peer organizations	33%
Contribute to knowledge of the field	31%
Assess general organizational performance	28%
Inform / influence government	26%
Other	3%

There is a reasonably consistent association between evaluating organizational outputs or outcomes and reporting of evaluation results. Without exception, charities that evaluate their outputs, and particularly their outcomes, are more likely to report to any given audience. In addition, charities that evaluate their impact are particularly likely to use results to report to both fundees (50%) and senior management (44%), while those evaluating their return on investment are more likely to use evaluation results to communicate with the general public or media (69%). Reporting of evaluation results is also associated with the use of specific evaluation methods or resources. There are particularly strong associations between the use of web statistics and reporting to the general public or media (71%) and to the people the charity serves (67%). Charities that use interviews (89%) and statistical compilations (88%) are particularly likely to report evaluation results to funders, while those drawing on experimental studies (62%), interviews (54%) and administrative data (45%) are more likely to report results to organizations they fund or otherwise support. Finally, reporting to senior management is strongly associated with use of standardized assessment tools (59%) and more moderately associated with the use of administrative data (43%).

REPORTING BY ASPECTS MEASURED

Charities evaluating their outputs and outcomes are more likely to use results for reporting.

	Outputs	Outcomes
Board of Directors	92%	93%
Funders / supporters	88%	89%
Public / media	60%	62%
People the organization serves	58%	62%
Funded / supported organizations	45%	43%
Senior management	40%	42%
Peer organizations	37%	40%

AVERAGE NUMBER OF AUDIENCES BY ORGANIZATION SIZE

The number of audiences charities report to increases with organization size.

2.9	3.7	4.5
Small Charities	Medium Charities	Large Charities

Unsurprisingly, charities that evaluate their outputs and outcomes are more likely to use evaluation results to learn about both aspects of their work, as are charities that evaluate the quality of their work. Charities that measure the impact of their work, on the other hand, stand out as being more likely to seek to learn from how the work is conducted (57%) and to contribute to the knowledge of their field (43%). Charities evaluating their return on investment are also more likely to use evaluation results to contribute to the knowledge of the field (44%). Looking at evaluation measures, the most consistent association is with the use of logic models or theories of change. Charities using this approach are more likely to seek to learn about the objectives (89%) and outcomes (86%) of their work, as well the specifics of its implementation (60%), and to seek to contribute to the knowledge of the field (51%). Beyond this association, charities using surveys are more likely to use evaluation results to understand whether the objectives of their work have been achieved (81%), while those drawing on interviews (77%) and statistical compilations (71%) are more likely to be seeking to understand its outcomes. Charities using case studies are more likely to seek to contribute to the knowledge of the field (57%) and to learn from how the work was implemented (67%). The same is true of charities using focus groups (46% used results to contribute to the knowledge of the field; 57% to learn from how initiatives were implemented).

ASPECTS MEASURED BY TYPE OF LEARNING

	Outputs	Outcomes	Quality
Learning whether original objectives achieved	77%	83%	82%
Learning about outcomes of the work	71%	77%	74%
Learning from how initiatives were implemented	46%	49%	51%

Charities evaluating the outputs, outcomes and quality of their work are more likely to use evaluation results to learn about particular aspects of their work.

Using evaluation results to aid decision-making is linked to outcome and particularly impact evaluation. Charities evaluating these aspects of their work are more likely to use evaluation results for all facets of decision-making. Beyond this, charities evaluating their outputs are more likely to use results to revise existing programs (77%) and to allocate resources (61%), as are those evaluating their return on investment (76% use results to allocate resources). In terms of associations with specific evaluation measures, charities drawing on administrative data and web statistics are broadly more likely to use results to support decision making. Use of logic models or theories of change (82%) and case studies (81%) correlates with significantly increased focus on organizational strategy, while those using statistical compilations are modestly more likely to revise programs (78%) and allocate resources (62%).

ASPECTS MEASURED BY DECISION-MAKING

	Outputs	Impact	Administrative data	Web statistics
Revise programs / initiatives	77%	82%	78%	81%
Develop new programs / initiatives	73%	78%	74%	80%
Plan / revise organizational strategies	66%	68%	70%	76%
Allocate resources	61%	70%	64%	65%

Organizations evaluating their outcomes and impact and drawing on administrative data and web statistics are more likely to use evaluation results for decision-making.

Charities evaluating their outputs (50%) and outcomes (53%) are somewhat more likely to use results to benchmark organizational performance. The same is true of charities that draw on web statistics (61%), administrative data (53%) and statistical compilations (54%) and make use of surveys (56%) to evaluate their work. More generalized assessment of organizational performance does not seem to be significantly associated with evaluating particular aspects of the organization's work or using specific measures. Looking at associations with public policy work, charities that evaluate both their impact (34%) and particularly the return on investment of their work (38%) are more likely to use results to inform or influence government. In terms of evaluation methods, there are strong associations with both the use of logic models or theories of change (44%) and experimental approaches (54%).

Looking at how uses of evaluation results vary with organizational characteristics, the clearest pattern is with organization size. Among other uses, the likelihood of using results to communicate with the public or media increases with organization size, as does using results to report to senior management and benchmark organizational performance. Use of evaluation results also varies with how organizations are funded. Charities that primarily depend on earned income are significantly less likely to use evaluation results to communicate with the general public or media (43%). Instead, they are more likely to focus on benchmarking organizational performance (49%) and learning from how initiatives are implemented (48%). Quebec charities stand out as being somewhat less likely to use evaluation results for decision-making, such as to allocate resources (45%), revise existing programs or initiatives (56%), or develop new programs (57%). They are also much less likely to use results to benchmark organizational performance (26%). Alberta charities, on the other hand, are more likely to use evaluation results to inform organizational strategy (70%) and to learn about the outcomes of the work (82%). In terms of variation by sub-sector, Social services organizations are comparatively likely to use evaluation results to report to their senior leaders (42%) and to share results with peer organizations (39%). Education organizations are more likely to seek to better understand the outcomes of their work (75%), while Arts, culture & recreation organizations are less likely to do so (57%). Health organizations are more likely to use results to contribute to the knowledge of the field (38%) and to inform or influence policymakers (33%). Finally, Grantmaking, fundraising & voluntarism organizations stand out as being comparatively unlikely to use results to inform policymakers (15%), revise programs (58%), or to inform organizational strategy (49%).

USE OF EVALUATION RESULTS BY ORGANIZATION SIZE

The likelihood of using results in a number of key ways increases with organizational size.

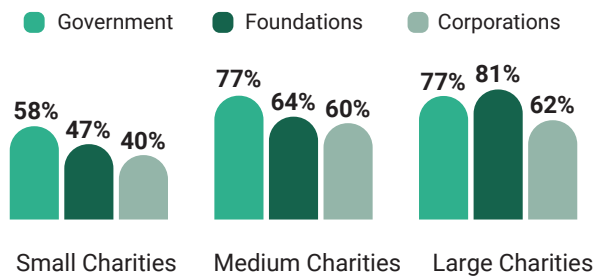|	Small	Medium	Large
Communicate with public / media	41%	58%	71%
Report to senior management	15%	42%	76%
Benchmark organizational performance	27%	48%	77%
General assessment of performance	24%	29%	41%
Allocate resources	48%	58%	75%
Inform / influence policy	14%	31%	42%

THE ROLE OF FUNDERS

External funding is extremely common among charities responding to the survey; fully 90% say they receive some form of external funding. The most common source is governmental—federal, provincial or municipal—reported by 70% of charities, followed by foundation (60%) and corporate (53%) funding. About a fifth (20%) of externally funded charities said their funders provided funding specifically intended for evaluation. Government funders are most likely to do this (19% of charities receiving government funding say their funding includes money specifically for evaluation), followed by foundation (13% of foundation-supported charities), and corporate funders (5%).

RECEIVING EXTERNAL FUNDING BY ORGANIZATION SIZE

The likelihood of receiving external funding tends to increase with organization size.

● Government   ● Foundations   ● Corporations

Small Charities: 58% 47% 40%
Medium Charities: 77% 64% 60%
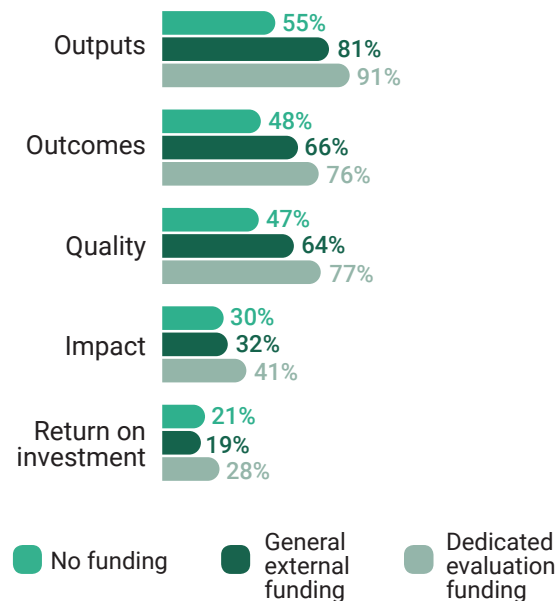**Large Charities**: 77% 81% 62%

Charities receiving external funding tend to allocate a larger percentage of their budgets to evaluation—a median of 5%—compared to just 1% for charities that do not receive external funding. However, whether charities receive funding specifically dedicated to evaluation does not seem to make a significant difference to their evaluation budgets. Charities with dedicated evaluation funding and charities without dedicated evaluation funding both allocate the same median 5% of their total budgets to evaluation.

Charities receiving external funding are markedly more likely to evaluate the outputs, outcomes and quality of their work. When a portion of their funding is specifically dedicated to evaluation, they are even more likely to do so. Turning to evaluation of impact and return on investment, charities receiving external funding are not significantly more likely to evaluate these aspects of their work unless that external funding includes funds specifically dedicated to evaluation.

ASPECTS EVALUATED BY EXTERNAL FUNDING

Charities receiving dedicated evaluation funding are more likely to evaluate all aspects of their work.

Outputs: 55% / 81% / 91%
Outcomes: 48% / 66% / 76%
Quality: 47% / 64% / 77%
Impact: 30% / 32% / 41%
Return on investment: 21% / 19% / 28%

● No funding   ● General external funding   ● Dedicated evaluation funding

A similar pattern is seen with the measures charities use to evaluate their work. Charities with general external funding and charities with external funding dedicated to evaluation are more likely to use all measures. Some measures appear to be more correlated with receiving external funding and others with receiving dedicated evaluation funding, in the sense that the likelihood of using them increases much more with one factor than the other. For example, the likelihood of using experimental approaches is slightly higher among charities receiving general external funding (5% vs. 3%), but is dramatically higher among charities with dedicated evaluation funding (19%). Similar patterns are seen with the use of logic models / theories of change and case studies. Use of other measures such as standardized assessment tools are significantly higher among charities receiving general external funding (16% vs. 3%), and somewhat more modestly higher among charities with dedicated evaluation funding (27%). Use of administrative data, statistical compilations and surveys also seem to be more correlated with external funding than with dedicated evaluation funding. Overall, what appears to be happening is that availability of dedicated evaluation funding is more correlated with some of the less common, more involved evaluation measures.

MEASURES USED BY EXTERNAL FUNDING

Measure	No funding	General external funding	Dedicated evaluation funding
Administrative data	45%	68%	77%
Statistical compilations	39%	66%	81%
Surveys	30%	55%	76%
Interviews	31%	47%	63%
Web statistics	24%	38%	60%
Focus groups	17%	29%	52%
Logic models / theories of change	11%	20%	49%
Standardized assessment tools	3%	16%	27%
Case studies	9%	14%	28%
Experimental studies	3%	5%	19%
Other method(s)	7%	4%	3%
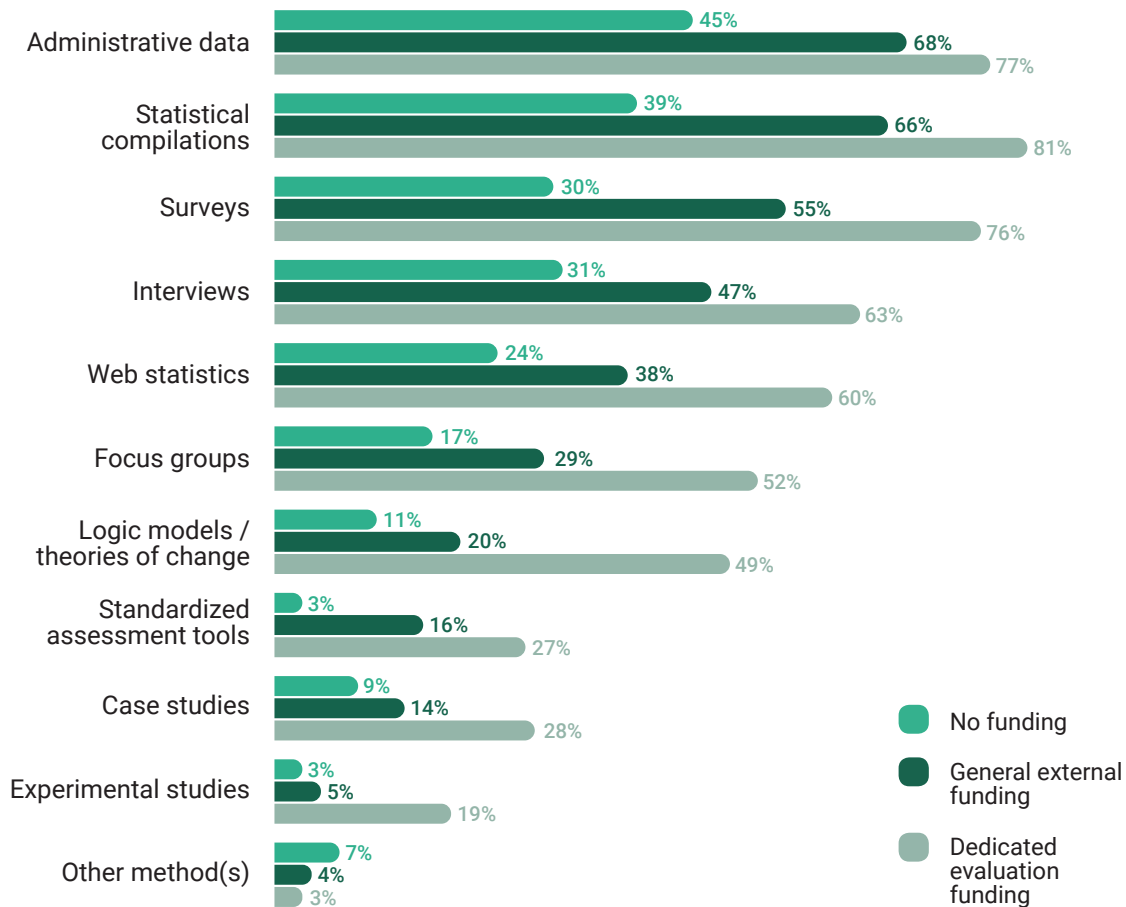
Unlike with evaluation methods and objectives, the presence of general external funding and dedicated evaluation funding does not appear to correlate with significant differences in how charities use evaluation results. The only exception to this general pattern, unsurprisingly, is that charities without external funding are substantially less likely to use evaluation results to report to their funders or supporters (54% ↓27), while charities receiving funding dedicated to evaluation are more likely to use evaluation results to report to their funders or supporters (95% ↑14).

EXTERNAL FUNDING/DEDICATED EVALUATION FUNDING BY ORGANIZATION SIZE

The likelihood of receiving dedicated evaluation funding increases with organization size.

	No funding	General external funding	Dedicated evaluation funding
Small Charities	16%	75%	10%
Medium Charities	8%	72%	21%
Large Charities	6%	63%	31%
All Charities	10%	72%	18%
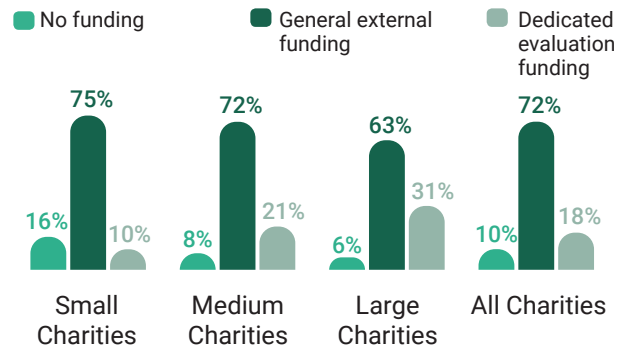
Depending on their characteristics, some charities are more likely than others to receive general external funding and/or external funding dedicated to evaluation. Charities that depend primarily on government revenues are somewhat more likely to report receiving external funding with evaluation support (24% ↑6) while charities that depend on earned income are substantially less likely to report receiving any external funding (76% ↓14). Ontario charities are particularly likely to report receiving external funding with dedicated support for evaluation (25% ↑7), while charities from the Prairies are less likely to do so (9% ↓9). Grantmaking, fundr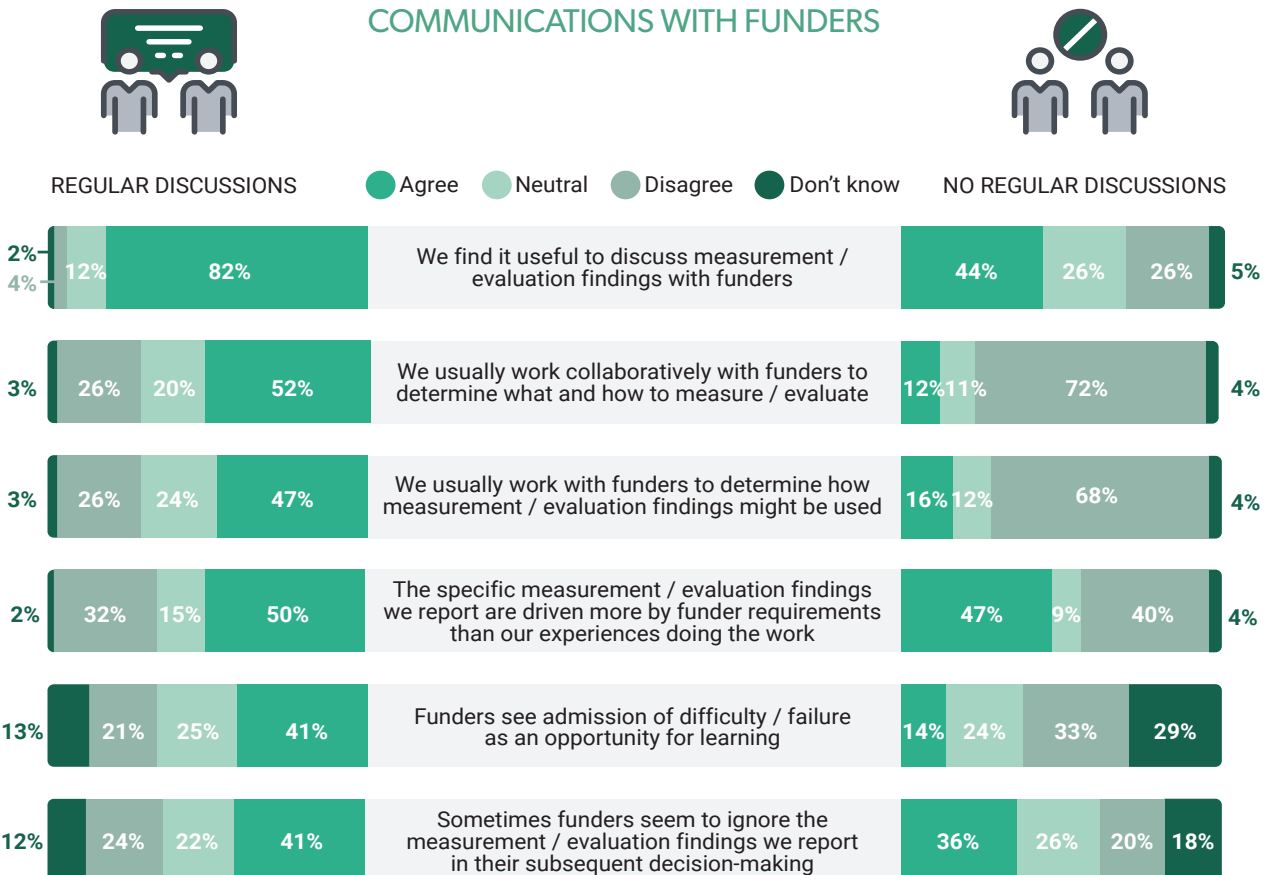aising & voluntarism organizations are less likely to receive external funding (79% ↓11). Arts, culture & recreation organizations are more likely to receive external funding without dedicated evaluation support (83% ↑11) while Education organizations (23% ↑5) are more likely to receive external funding incorporating such support.

COMMUNICATIONS BETWEEN FUNDERS AND FUNDEES

Regular communications between funders and fundees appear to be key to making the best use of evaluation results. Charities that regularly discuss evaluation findings with their funders (44% of externally-funded charities) have more positive views of many aspects of the funder-fundee relationship than charities that do not regularly discuss evaluation findings (35% of charities). With regular communications with funders, they find discussions of evaluation findings to be more useful, they are more likely to collaborate with funders to determine what to evaluate or measure, and they are more likely to work with funders to determine how evaluation findings might be used. However, regular communications do not seem to ameliorate some challenges.

Most significantly, given the complex nature of the challenges funders and fundees are working together to address, charities that regularly communicate with funders about evaluation are about as likely as others to not be forthcoming with the challenges and difficulties they face. Similarly, both communicative and non-communicative charities are roughly equally likely to believe that what they are asked to report is driven more by funder requirements than their own experiences and that funders sometimes seem to ignore evaluation findings in subsequent decision-making. This indicates that there is still significant work to be done in the area of funder-fundee relations.

COMMUNICATIONS WITH FUNDERS

REGULAR DISCUSSIONS   ● Agree ● Neutral ● Disagree ● Don't know   NO REGULAR DISCUSSIONS

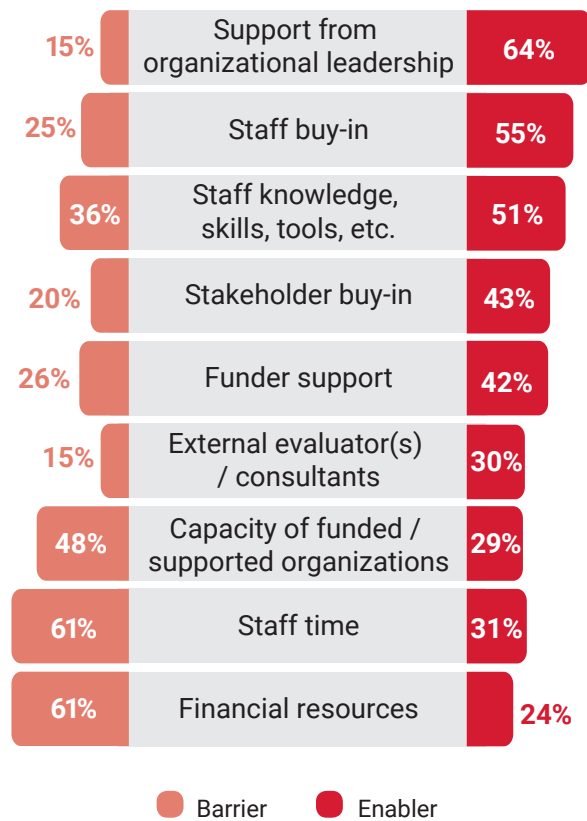|	REGULAR DISCUSSIONS	Statement	NO REGULAR DISCUSSIONS	
2% / 4%	12% / 82%	We find it useful to discuss measurement / evaluation findings with funders	44% / 26% / 26%	5%
3%	26% / 20% / 52%	We usually work collaboratively with funders to determine what and how to measure / evaluate	12% / 11% / 72%	4%
3%	26% / 24% / 47%	We usually work with funders to determine how measurement / evaluation findings might be used	16% / 12% / 68%	4%
2%	32% / 15% / 50%	The specific measurement / evaluation findings we report are driven more by funder requirements than our experiences doing the work	47% / 9% / 40%	4%
13%	21% / 25% / 41%	Funders see admission of difficulty / failure as an opportunity for learning	14% / 24% / 33%	29%
12%	24% / 22% / 41%	Sometimes funders seem to ignore the measurement / evaluation findings we report in their subsequent decision-making	36% / 26% / 20%	18%

ENABLERS AND BARRIERS

Many factors can affect a charity's capacity to conduct evaluation and make use of findings. When present at sufficient levels (or of sufficiently high quality) they tend to function as enablers, increasing a charity's evaluation capacity. When they are not present (or are of poor quality) they tend to function as barriers, hindering charities in their evaluation work. For each factor covered, we asked charities whether it was an enabler or barrier to their work. Based on responses to the survey, **support from organizational leaders and staff buy-in are the most common enablers while lack of money and staff time are the most common barriers.** Most other factors (e.g., staff knowledge, skills and tools) fall into a middle ground, functioning as barriers when absent and enablers when present.

Whether charities experience these factors as enablers or barriers is related to the aspects of their work they evaluate, particularly outcomes and impact. Charities reporting buy-in from their stakeholders and staff as enabling factors are more likely to measure their outcomes (78% ↑14 and 75% ↑11 respectively). The same is true for charities reporting support from their leadership (73% ↑9). Similarly, charities reporting a number of enablers are more likely to evaluate the impact of their work. Significant enablers include stakeholder buy-in [(40% ↑7) experiencing this enabler evaluated their impact], funder support (39% ↑6), financial resources (39% ↑6), staff knowledge, skills and tools (38% ↑5), staff buy-in (38% ↑5), and leadership support (37% ↑4).

Interestingly, while lack of staff time and financial resources are frequently reported as barriers, they do not appear to be important barriers in the context of using particular evaluation methods or resources. In fact, where there are statistically significant differences, charities reporting these factors as barriers are more likely to use a given method or resource rather than less. Though less commonly reported as a barrier, the same pattern is seen with funder support. It appears that rather than preventing charities from evaluating their work, these barriers function more as hinderances and likely indicate competing demands for organizational resources.

ENABLERS AND BARRIERS OF EVALUATION

Barrier	Factor	Enabler
15%	Support from organizational leadership	64%
25%	Staff buy-in	55%
36%	Staff knowledge, skills, tools, etc.	51%
20%	Stakeholder buy-in	43%
26%	Funder support	42%
15%	External evaluator(s) / consultants	30%
48%	Capacity of funded / supported organizations	29%
61%	Staff time	31%
61%	Financial resources	24%

🔴 Barrier   🔴 Enabler

BUY-IN AS ENABLER

Staff and stakeholder buy-in appear to be key enablers for many evaluation methods / resources (percentage using method / resource).

	Stakeholder buy-in	Staff buy-in
Statistical compilations	81% ↑16	76% ↑11
Surveys	66% ↑11	
Interviews	57% ↑10	
Standardized assessment tools	25% ↑9	
Experimental studies	12% ↑5	11% ↑4
Administrative data		76% ↑9
Web statistics		48% ↑8

Looking at how charities apply evaluation findings, there appears to be an association between using evaluation findings for reporting and support from organizational leadership as well as staff and stakeholder buy-in. Charities reporting these factors as enablers are more likely to use evaluation results in the above mentioned ways. Beyond these factors, charities reporting access to external evaluators or consultants as an enabler are particularly likely to use evaluation results to communicate with some less common audiences, including funded / supported organizations (52% ⬆16) and peer organizations (46% ⬆13) as well as in more common ways such as revising existing programs (84% ⬆14), benchmarking organizational performance (57% ⬆14), and contributing to knowledge of the field (40% ⬆9). Availability of financial resources, staff time, and funder support do not seem to be significantly associated with how charities apply evaluation findings.

LEADERSHIP SUPPORT AND BUY-IN AS ENABLERS

Leadership support and buy-in from staff and stakeholders are key enablers for reporting evaluation results to a number of audiences (percentage reporting findings to audience).

Audience	Value
Board of Directors	92% ⬆4
Public / media	62% ⬆9
People / audience served	61% ⬆8
Senior management	46% ⬆11
Peer organizations	41% ⬆8
Board of Directors	93% ⬆5
Public / media	64% ⬆11
Senior management	44% ⬆9
Peer organizations	42% ⬆9
Public / audience served	63% ⬆10
Senior management	47% ⬆12
Peer organizations	42% ⬆9
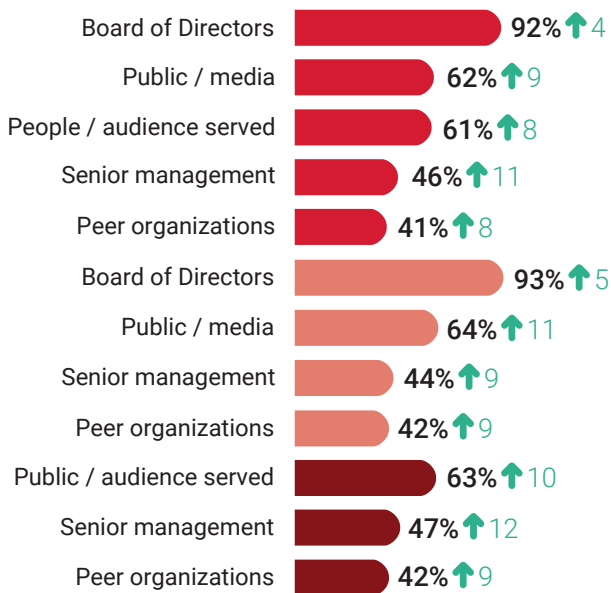
● Leadership support   ● Staff buy-in   ● Stakeholder buy-in

While financial resources, staff time and staff skills do not seem to be closely associated with what charities evaluate, how they do so, or how they use results, they do tend to be associated with how charities earn revenues and what sub-sector they are part of. Charities that depend primarily on government revenue are more likely to report all of these as barriers, while earned income dependent charities are more likely to view them as enablers. Similarly, Social services organizations are likely to see these factors as enablers, while Arts, culture & recreation charities are more likely to see them as barriers.

ORGANIZATIONAL CHARACTERISTICS

Presence of financial resources, staff time and staff knowledge, skills and tools are key enablers for charities that depend on earned income or work in the Social services sub-sector.

|	Earned income	Social services
Financial resources	34%	30%
Staff time	35%	38%
Staff knowledge, skills, tools, etc.	65%	62%

Absence of financial resources, staff time and staff knowledge, skills and tools are key barriers for charities that depend on government income or work in the Arts, culture & recreation sub-sector.

	Arts, culture & recreation	Government income
Financial resources	69%	67%
Staff time	68%	67%
Staff knowledge, skills, tools, etc.	41%	40%

OPINIONS ABOUT EVALUATION

Survey respondents were asked to assess their overall satisfaction with their organization's capacity to conduct evaluations and make use of results using a scale ranging from 0 (not at all satisfied) to 10 (completely satisfied). Overall, charities are moderately satisfied with their evaluation capacity (with an average satisfaction score of 6.4) but there is clearly a wide range of opinion.

SATISFACTION WITH EVALUATION CAPACITY

29%
20%
16%
10%
7%
6%
5%
4%
2%
1% 1%

0 1 2 3 4 5 6 7 8 9 10
not at all   totally
satisfied   satisfied
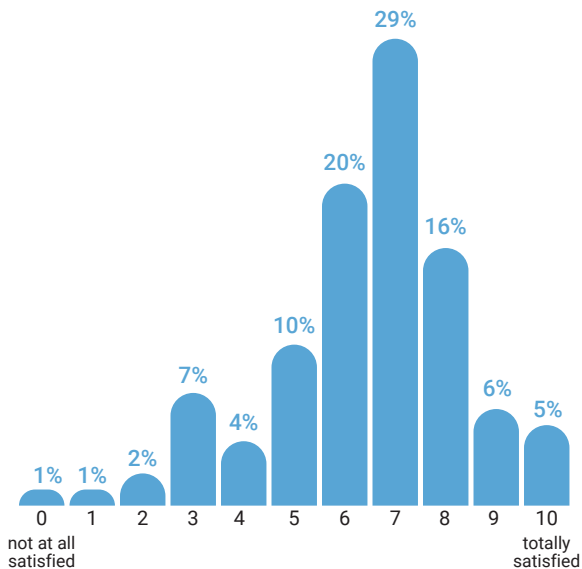
Satisfaction levels vary modestly according to what charities evaluate, how they do it, how they apply evaluation findings, and according to organizational characteristics. Charities evaluating both their impact (6.7 average satisfaction) and the return on investment (6.6) of their work tend to be somewhat more satisfied. Looking at the evaluation methods and resources used, charities using standardized assessment tools (6.7) and statistical compilations (6.5) tend to be more satisfied and charities using web statistics (6.0) and surveys (6.2) less satisfied. Using evaluation findings to report to funders or supporters (6.3) and the general public or media (6.2) or to measure general organizational performance without reference to defined benchmarks (6.1) all correlate with lower satisfaction, while contributing to the knowledge of the field (6.6) correlates with higher satisfaction. Turning to organizational characteristics, smaller charities tend to be more satisfied with their evaluation capacity (6.6) than large charities (6.1). Similarly, Social services organizations tend to be more satisfied (6.8) and Education organizations less satisfied (6.0).

Satisfaction levels are much more strongly correlated with the enablers and barriers experienced by charities. Regardless of the specific factor, charities reporting it as a barrier are significantly less satisfied with their evaluation capacity.

Satisfaction is also correlated with the degree to which charities focus their resources on certain types of activities. For example, charities that place a high priority[5] on research tend to be more satisfied with their evaluation capacity, as do charities placing a high priority on staff development. Other areas tend to be negatively correlated with evaluation capacity. Charities placing great emphasis on communications and marketing tend to be less satisfied, as do charities placing great emphasis on fundraising / revenue generation and organizational governance. Perhaps unsurprisingly, satisfaction levels varied most significantly with the degree of focus on measurement and evaluation.

SATISFACTION LEVEL BY ENABLERS & BARRIERS

	Enabler	Neutral	Barrier
Support from organizational leadership	6.5	6.3	5.5
Staff buy-in	6.4	6.4	5.6
Staff knowledge, skills, tools, etc.	6.7	6.8	5.4
Stakeholder buy-in	6.4	6.3	5.6
Funder support	6.5	6.4	5.5
External evaluator(s)/ consultant(s)	6.3	6.6	5.5
Capacity of funded/ supported organizations	6.3	7.0	5.1
Staff time	7.0	7.0	5.7
Financial resources	6.8	7.1	5.8

● Enabler   ● Neutral   ● Barrier

SATISFACTION LEVEL BY ORGANIZATIONAL PRIORITIES

Measurement & evaluation
- 6.0
- 6.5
- 7.3

Research
- 6.2
- 6.3
- 6.8

Staff development
- 6.2
- 6.2
- 6.7

Fundraising, revenue generation
- 6.9
- 6.5
- 6.1

Governance
- 6.5
- 6.3
- 6.1

Communications, marketing
- 6.8
- 6.3
- 6.1

● Low   ● Moderate   ● High
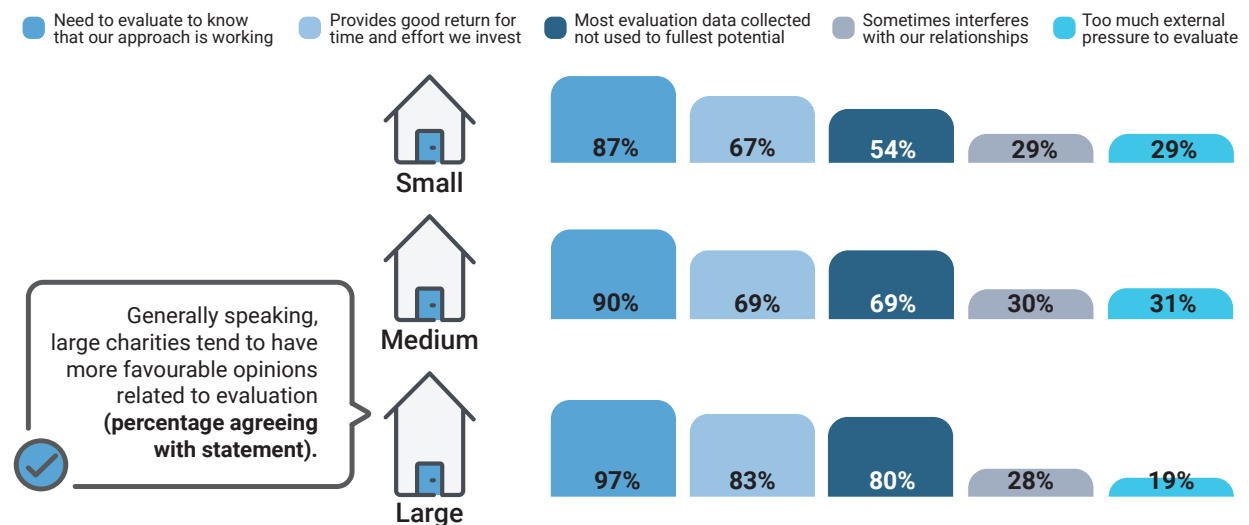
To better understand how evaluation fits in with other aspects of their work, charities were asked for their opinions related to various perspectives on evaluation. Overall, responses indicate significant support for evaluation, but also highlight potential challenges with some aspects of the work. Significant majorities of charities see the need for evaluation to guide their work and believe the resources they devote to this end are well-invested. While charities tend to view these activities as being internally driven, a significant minority reports excessive external pressures to evaluate. In terms of challenges, just over a third of charities say that measurement and evaluation can interfere with their relationships with the people they serve (e.g., privacy concerns, confusion about why information is being collected, etc.) and a strong majority of respondents believe that the evaluation data they collect is not used to its fullest potential.

OPINIONS ABOUT EVALUATION

Statement	Strongly disagree	Somewhat disagree	Neither agree nor disagree	Somewhat agree	Strongly agree
We need to measure and evaluate our activities in order to know that our approach is working	2%	3%	6%	30%	59%
Measurement and evaluation provides a good 'return' for the time and effort we invest in it	2%	9%	19%	41%	28%
Most measurement and evaluation data collected in our organization is not used to its fullest potential	6%	12%	18%	40%	25%
Collecting measurement and evaluation data sometimes interferes with our relationships with the people we serve	20%	24%	27%	22%	8%
There is too much external pressure on our organization to measure and evaluate	17%	26%	27%	20%	9%

Opinions about evaluation do not seem to vary according to what charities evaluate, how they evaluate it, or how they use evaluation results in any systematic way. Beyond revenue size, the most significant correlate of opinion about evaluation appears to be the presence of government funding. Charities not receiving government funding are much less likely to agree that there is too much external pressure to evaluate (4% strongly agree, 14% somewhat agree). These charities are also less likely to agree that collecting evaluation data can sometimes interfere with their relationships with the people they serve (4% strongly agree, 17% somewhat agree).

OPINIONS ABOUT EVALUATION BY ORGANIZATION SIZE

Generally speaking, large charities tend to have more favourable opinions related to evaluation **(percentage agreeing with statement).**

	Need to evaluate to know that our approach is working	Provides good return for time and effort we invest	Most evaluation data collected not used to fullest potential	Sometimes interferes with our relationships	Too much external pressure to evaluate
Small	87%	67%	54%	29%	29%
Medium	90%	69%	69%	30%	31%
Large	97%	83%	80%	28%	19%

THE ROLE OF NETWORKS

25% of charities belong to some sort of formal or informal group, network or association related to evaluation. The range of relationships described by survey respondents is extremely diverse, ranging from long-standing membership in national umbrella organizations through periodic consultations with like-minded organizations in the community and everything in between. Many charities report being involved in multiple relationships related to evaluation.

Charities belonging to an evaluation-related network are more likely to evaluate virtually all aspects of their work, particularly its impact (41% ⬆8), and return on investment (27% ⬆7). Similarly, these charities are also more likely to use many methods and resources to evaluate their work, particularly more specialized approaches such as standardized assessment tools (31% ⬆15), logic models or theories of change (37% ⬆13), focus groups (49% ⬆18), and surveys (72% ⬆17). Network members also differ in that they are more likely to share evaluation findings with peer organizations (52% ⬆19), benchmark their organizational performance (61% ⬆18), and to seek to influence government policy (40% ⬆14).

Network membership does not seem to be correlated with most organizational characteristics. The only discernible differences beyond revenue size are that Ontario charities are more likely (32%) and British Columbia charities less likely (20%) to be in a network.

## LIKELIHOOD OF BELONGING TO EVALUATION NETWORKS BY NUMBER OF METHODS OR RESOURCES

Charities that use more methods or resources to evaluate their work are more likely to be part of evaluation-related networks.

16% charities using three or fewer methods

28% charities using four to six methods

46% charities using seven or more methods

LIKELIHOOD OF BELONGING TO EVALUATION NETWORKS BY REVENUE SIZE

Larger charities are more likely to belong to evaluation networks.

17% Small Charities
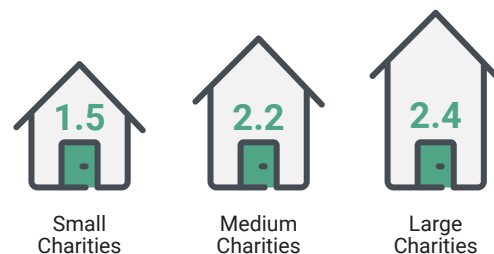
26% Medium Charities

50% Large Charities
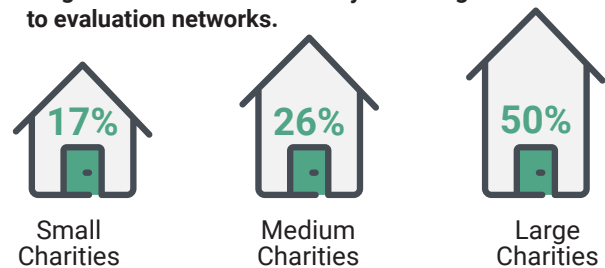
While the descriptions provided by survey respondents indicate that comparatively few of these network relationships centre on evaluation, charities are clearly drawing on them for a range of evaluation-related supports. The most common of these are tools for measurement and evaluation, training, and being part of larger projects. Least common are assistance finding external evaluation specialists or funding to support evaluation.

NETWORK PROVIDED SUPPORTS

Measurement and evaluation tools	54%
Training	42%
Part of larger projects	40%
Worked with funders	27%
Some other form of support	19%
Find external specialists	16%
Find funding	9%

AVERAGE NUMBER OF SUPPORTS DRAWN BY ORGANIZATION SIZE

The number of evaluation supports drawn from networks increases with organization size.

1.5 Small Charities

2.2 Medium Charities

2.4 Large Charities

Typically charities draw on their networks for a fairly small number of supports (2.1 on average). Charities that measure their impact tend to draw on networks for more supports (2.4), as do charities that share findings with peer organizations (2.4). Looking at organizational characteristics, Social services organizations tend to draw somewhat more supports (2.5), and Grantmaking, fundraising & voluntarism (1.6) somewhat fewer.

STAFFING

21% of charities report having at least one paid staff member primarily devoted to measurement and evaluation work. In the remaining 79% of charities, staff conduct their measurement and evaluation work as a supplement to their primary duties. In the absence of dedicated evaluation staff, this activity most commonly falls to the Executive Director / CEO, followed by program staff or volunteers. About two thirds of the time, responsibility for evaluation is spread across multiple positions. Usually the group responsible includes the ED/CEO or program staff (80% of the time), but when it does not, responsibility tends to devolve to the board of directors or to the administrative and finance staff.

RESPONSIBILITY FOR EVALUATION IN THE ABSENCE OF DEDICATED STAFF

63% ED/CEO President

50% Program staff/volunteers

31% Administrative & finance staff/volunteers

25% Chair and/or Board member(s)

16% Marketing & communications staff/volunteers

14% Fundraising staff/volunteers

9% Outside evaluators/consultants

10% Other group(s)

1% No one

Some types of charities are more likely than others to have dedicated evaluation staff. Large organizations are substantially more likely to report dedicated evaluation staff (41%), as are Social services organizations (25%). Arts, culture & recreation organizations, on the other hand, are less likely to report dedicated evaluation staff (15%), as are charities that do not receive government funding (15%).

Charities with dedicated evaluation staff are more likely to draw on a number of specific methods and resources when they evaluate their work. The largest differences are seen with some of the more involved approaches, including experimental studies (13% ↑6), standardized assessment tools (28% ↑12), logic models or theories of change (36% ↑12), case studies (22% ↑6), and focus groups (41% ↑10). These charities are also somewhat more likely to draw on statistical compilations (76% ↑11). Interestingly, the presence of dedicated evaluation staff does not seem to significantly affect which aspects of their work charities evaluate or how they use evaluation findings.

Broadly speaking, charities with dedicated evaluation staff also tend to have more positive opinions about evaluation. They tend to be significantly more satisfied with their overall evaluation capacity (7.0 average rating ↑0.6). They are also more likely to believe that they need to evaluate their activities to know that they are effective (68% strongly agree ↑9) and that evaluation provides a good return for the resources invested in it (38% strongly agree ↑10). Conversely, they are somewhat less likely to agree that the measurement and evaluation data their organization collects is not used to its fullest potential (22% strongly agree ↓3).

Finally, charities with dedicated evaluation staff are more likely to see most potential enablers and barriers as enablers. This is particularly the case with staff time (46% view it as an enabler ↑15), and financial resources (35% ↑11), as well as staff skills and knowledge (63% ↑12) and funder support (51% ↑9). Even when the amount of emphasis charities place on measurement and evaluation is accounted for, these associations remain.

PRESENCE OF DEDICATED EVALUATION STAFF VS ORGANIZATION SIZE

Large charities are much more likely to have dedicated evaluation staff.

19% small charities

19% medium charities

41% large charities

EXTERNAL EVALUATORS

22% of charities report having worked with an external consultant or organization in some capacity related to evaluation during the previous year.

Working with external evaluators is more common among charities with at least one staff member dedicated to evaluation (31%) and charities receiving funding from foundations (27%) and corporations (26%). Looking at primary revenue source, charities that depend on government funding are more likely to work with external evaluators (27%), while those primarily dependent on gifts and donations are less likely to do so (17%). In terms of regional variations, charities from British Columbia (16%) and Alberta (18%) are less likely to engage external evaluators while Ontario charities (26%) are more likely to do so. Once other factors are accounted for, the likelihood of engaging external evaluators does not seem to vary greatly according to sub-sector.

ENGAGING EXTERNAL EVALUATOR BY ORGANIZATION SIZE

Larger charities are more likely to work with external evaluators.

12% **24%** **51%**

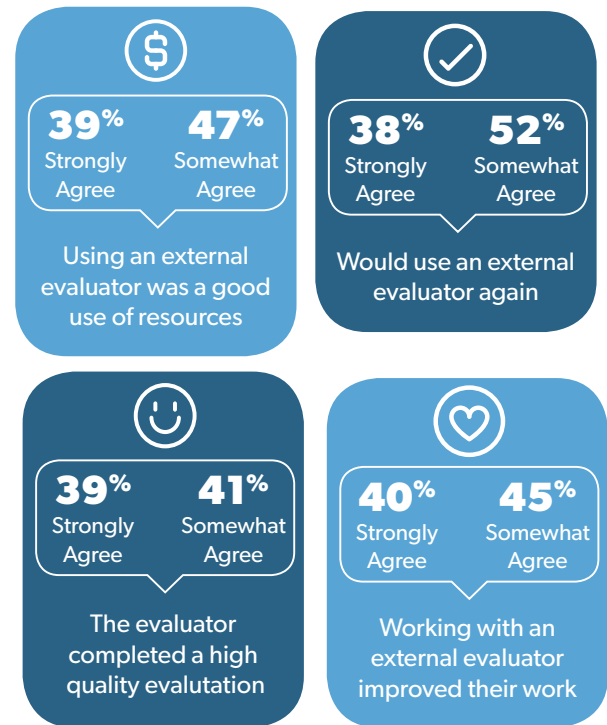Small Charities   Medium Charities   Large Charities
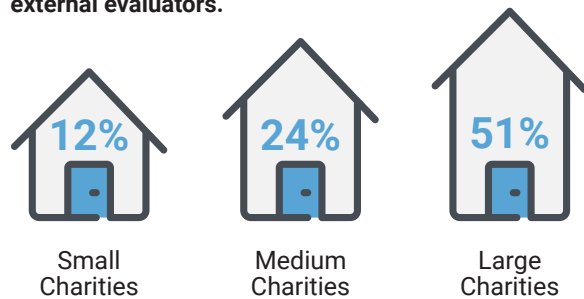
To an extent, charities appear to be working with external evaluators because they feel they lack evaluation capacity. Charities that engage external evaluators tend to be less satisfied with their evaluation capacity (5.8 ↓0.6), particularly if they also lack dedicated evaluation staff (5.5 ↓0.9). However, while these charities may feel less satisfied with their capacity, it is far from clear that they actually have lower evaluation capacities. Charities drawing on external evaluators tend to evaluate more aspects of their work and are particularly likely to evaluate more involved aspects of it, including return on investment (29% ↑9), impact (41% ↑8), and quality (79% ↑15). The same is true when looking at evaluation methods and resources. Charities engaging external evaluators draw on a larger number of measures and are particularly likely to use more involved methods, including experimental approaches (19% ↑12), logic models / theories of change (45% ↑21), standardized assessment tools (28% ↑12), focus groups (52% ↑21) and case studies (26% ↑10). Interestingly, once other factors are accounted for, char-

ities engaging external evaluators do not seem to use their evaluation results differently. Speculatively, this may be what is driving the association between use of external evaluators and lower levels of overall satisfaction with evaluation capacity.

Overall, charities are quite satisfied with the support they receive from external evaluators and majorities express satisfaction with each aspect of their experiences. Similarly, charities engaging external evaluators are substantially more likely to strongly agree that they receive a good return on the resources they invest in evaluation (39% ↑11) and that they need to evaluate their activities to know that their approach is working (72% ↑13).

EXPERIENCES WITH EXTERNAL EVALUATORS

39% Strongly Agree **47%** Somewhat Agree

Using an external evaluator was a good use of resources

38% Strongly Agree **52%** Somewhat Agree

Would use an external evaluator again

39% Strongly Agree **41%** Somewhat Agree

The evaluator completed a high quality evalutation

40% Strongly Agree **45%** Somewhat Agree

Working with an external evaluator improved their work

Education organizations appear to face particular challenges working with external evaluators. They are less likely than other charities to believe that working with an external evaluator was a good use of their resources (76%), that it improved their work (79%) or that they received high quality evaluations (76%). Health organizations are even less likely to believe they have received high quality evaluations from external evaluators they have worked with (72%).

METHODOLOGY

SUMMARY. The survey was conducted between May 10 and July 8, 2018. Survey invitations were sent to 7,529 charities from across Canada. Potential respondents received an invitation e-mail directing them to an interactive survey website where they could complete the survey. Periodic reminders spaced roughly two weeks apart were sent during the survey period to help increase the response rate. We received 1,884 useable responses (1,703 complete and 181 partial). Once e-mails that did not reach the intended recipient are taken into account, the net response rate was 24.6%.

RESPONDENTS. Executive Directors / CEOs (64%) and board chairs / members (12%) accounted for the majority of respondents. Administration and finance staff accounted for 7%, program and evaluation staff 3%, and fundraising, marketing and communications staff 3%. Other staff and volunteer roles accounted for the remaining 11%.
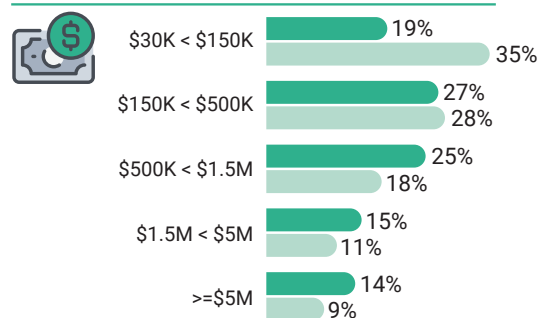
SAMPLE. Registered charities with annual revenues of $30,000 or more that were not religious congregations were considered in-scope for this survey. The contact sample was drawn from a number of different sources. The largest component (51.4% of total) was a convenience sample of charities drawn from the memberships of Imagine Canada and a number of other umbrella organizations. The next largest component (28.5%) was randomly drawn from the population of in-scope Canadian charities. The remaining 20.1% was a convenience sample of nonprofits and charities from the Ontario Trillium Foundation's contact list.

RESPONSE RATES. Response rates varied between samples. They were highest with the Ontario Trillium Foundation convenience sample (27.5%), followed by the Imagine Canada convenience (24.5%) and randomly drawn (22.5%) samples. Response rates also varied somewhat with organizational characteristics. Response rates were lower among charities with annual revenues less than $150,000, and among British Columbia charities and charities working in the Education and Grantmaking, fundraising & voluntarism promotion sub-sectors. Response rates were higher among charities with annual revenues between $500,000 and $1,499,999 and charities located in the Prairies or working in the Arts, culture & recreation sub-sector.
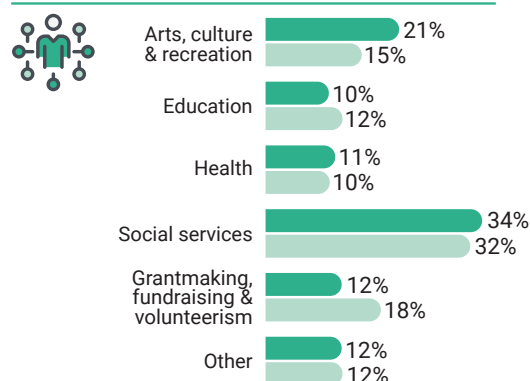
WEIGHTING STRATEGY. Responses were weighted according to revenue size, sub-sector and region in order to account for differences between the survey sample and the population of in-scope charities and for differences in response rate. Population counts were based on the 2016 distribution of registered charities. In general terms, weights tended to be higher among charities with annual revenues less than $150,000, charities working in the Education and Grantmaking, fundraising & voluntarism sub-sectors, and charities located in the Prairies, Quebec and Atlantic Canada. Charities located in British Columbia, and Ontario tended to be weighted lower, as did charities in the Arts, culture & recreation sub-sector and charities with annual revenues of $5 million or more.

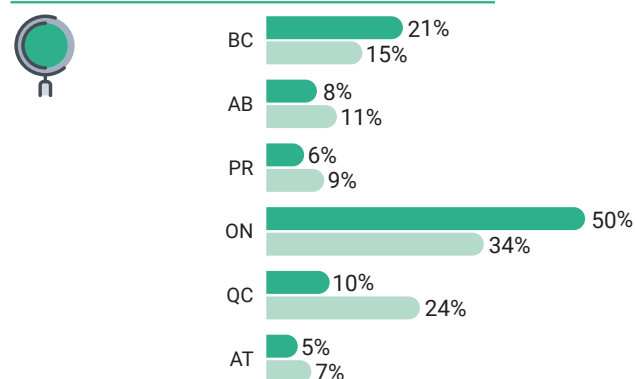## WEIGHTED AND UNWEIGHTED DISTRIBUTION OF SURVEY RESPONDENTS BY KEY VARIABLES

ANUAL REVENUE SIZE

	Unweighted	Weighted
$30K < $150K	19%	35%
$150K < $500K	27%	28%
$500K < $1.5M	25%	18%
$1.5M < $5M	15%	11%
>=$5M	14%	9%

ORGANIZATION TYPE

	Unweighted	Weighted
Arts, culture & recreation	21%	15%
Education	10%	12%
Health	11%	10%
Social services	34%	32%
Grantmaking, fundraising & volunteerism	12%	18%
Other	12%	12%

REGION

	Unweighted	Weighted
BC	21%	15%
AB	8%	11%
PR	6%	9%
ON	50%	34%
QC	10%	24%
AT	5%	7%

■ Unweighted
■ Weighted

KNOWN BIASES. Beyond the ways survey respondents differ from the population of in-scope charities described above (which we have attempted to compensate for with our weighting strategy), there are two other key differences we believe affect survey results which we were not able to compensate for. First, the percentage of respondents without paid staff (22.4%) is higher than among the general population of in-scope charities (35.1%). Second, the percentage of respondents (70.3%) reporting government funding is somewhat higher than among the population of in-scope charities (61.5%). Because both receiving government funding and having paid staff tend to correlate with higher levels of evaluation activity, survey findings should probably be considered to be something of high bound estimates. That said, given the magnitude of the differences between the survey sample and population and the strength of the associations, we believe practical differences are modest.

DEFINITION OF MEASUREMENT METHODS AND RESOURCES. Measurement methods and resources were defined as follows: *Case studies*—detailed examination of one or a few subjects (individuals, organizations, situations, etc.); *Statistical compilations*—counts of services delivered / programs / individuals served or other measures of the organization's volume of activity; *Administrative data*—internal tracking forms, documentation review, etc.; *Web statistics*—social media statistics, downloads or other web analytics; *Surveys*—typically feedback questionnaires, but may include other types of surveys such as long-term follow-up surveys; *Interviews*—one on one discussions (could include participants / clients, staff members, volunteers, or other stakeholders); *Focus groups*—structured discussions with small groups (could include participants / clients, staff members, volunteers, or other stakeholders); *Logic models / theories of change*—depictions of the relationships between the resources, activities, outputs, and outcomes / impacts of a program; *Standardized assessment tools*—clinical assessments, ability / achievement tests, etc.; *Experimental studies*—control group studies, before and after studies, etc.

ABOUT IMAGINE CANADA

IMAGINE CANADA

Imagine Canada is the national charitable organization whose cause is Canada's charities. Our three broad aims are to amplify the sector's collective voice, create opportunities to connect and learn from each other, and build the sector's capacity to succeed.

Impact evaluation plays an integral part in our vision for a stronger Canada. Through our research our goal is to support a sector-wide operating culture where organizations use data, information and knowledge to make better decisions.

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