

A stylized graphic of a person in a yellow silhouette, holding a banner that curves across the top of the page. The banner is orange and white. The person is standing on a green, wavy shape that resembles a hill or a wave. The background is white.

**YIP MATTERS!**

USING WHAT WE'VE LEARNED:  
INTRODUCTION TO TOOLKIT  
AND BACKGROUNDER-EVALUATION  
AND HOW IT CAN HELP OUR YAC

AN EVALUATION TOOLKIT FOR YOUTH PHILANTHROPY

[www.yipcanada.org](http://www.yipcanada.org)

## ACKNOWLEDGEMENTS

### Youth in Philanthropy Evaluation Tool Kit

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# YIP MATTERS!



## INTRODUCTION TO TOOLKIT

Community foundation Youth Advisory Councils (YACs) are booming across Canada. They are one of the fastest-growing and most exciting aspects of community engagement and philanthropy today. Through small grants and other leadership activities, YACs are helping hundreds of fantastic community projects make a difference to young people and their communities in every province of Canada. At the same time, youth involved in YACs and in other aspects of Youth in Philanthropy are developing skills and networks they need for work and life. It's a win-win-win for grant recipients, participants, and communities. And when they operate at their very best, their most effective, YACs and Youth in Philanthropy programs are that much more powerful.

To be the best they can be, young volunteers, adult advisors, community foundation leaders, funders, and other folks involved in community development want to know: What difference are we making? What are the best ideas? Are we achieving what we set out to do? Can we learn from successes and failures – our own and others'? How can we work smarter?

## YIP MATTERS! AN EVALUATION TOOLKIT FOR PHILANTHROPY

The Youth in Philanthropy program of Community Foundations of Canada is introducing this package of tools to help YACs across the country learn from each other and begin to answer those questions. The tools are designed for YACs – but with a bit of adaptation, they will also be useful for other organizations that want to understand what they are doing well and what they could improve.

Information collected with these tools will be used to improve YAC practice and to build a database of YAC activity across the country. The information will be of interest to a number of people: YACs themselves, their local community foundation, Community Foundations of Canada and the community foundation movement as a whole, and funders or other organizations who are making small grants or promoting youth engagement.

## THE YIP MATTERS! TOOLKIT INCLUDES:

- ❖ Intro to Toolkit and Background: Evaluation and How it Can Help Our YAC
- ❖ Learning from Our Perspectives:
  - Part One: A Questionnaire for Individual YAC Members
  - Part Two: A Questionnaire for Adult Advisors and Community Foundations
  - Part Three: An Analysis and Discussion Guide Focus on YAC Experience
- ❖ Listening to Our Projects: A Questionnaire for Grant recipients
- ❖ Using What We've Learned: An Analysis and Discussion Guide Focused on Grantmaking

## BACKGROUND: EVALUATION AND HOW CAN IT HELP OUR YAC

### NO FEAR...!

Evaluation is one of those words that scare people off. We tend to think “uh-oh... pass/fail, you did this wrong, you didn't measure up.” But for a YAC, evaluation is actually about learning. It's about finding out, in a planned and organized way, what you've done, how you've done it, and whether there are ways you could do it better the next time. It's about improving what you're doing and making informed choices about what to do in the future – not proving that what you've done is good or bad. This approach to evaluation is about learning, not judging.

### WHY EVALUATE:

- ❖ To learn
- ❖ To improve
- ❖ To identify results
- ❖ To measure impact



### QUESTIONS, QUESTIONS, QUESTIONS...

Evaluation helps you get answers to important questions – and you determine what those questions are.

The first evaluation step is to decide what you want to find out. For example, if you're assessing your YAC's effectiveness, your YAC might want to know how many young people were helped by its grants, or whether the projects the YAC funded this year were successful. Did they reach their objectives? Or your YAC might want to know what the community foundation (really!) thinks of the YAC's work. Those are some of the questions evaluation might answer for a YAC – but your YAC will decide the questions that are important for you.

### LEARNING FROM EACH OTHER – YACS ACROSS CANADA

Although every YAC is independent and unique, YACs do have lots in common with each other – and there really isn't much point in reinventing the wheel. Evaluation is a way of sharing information with other YACs. Odds are there are ways a YAC in Saskatchewan is working that could help you be more successful in New Brunswick. Or a YAC in Manitoba may have learning to share with a YAC in BC.

### SO THE POINT OF EVALUATING IS...?

- ❖ To improve your YAC activities and meetings
- ❖ To identify your YAC's strengths and build on them
- ❖ To uncover problems and find alternatives to improve your work
- ❖ To understand the outcomes of your work and the process you use and how they achieve your goals and respond to needs in your community
- ❖ To support and strengthen the projects and programs that your YAC funds
- ❖ To give grant recipients the opportunity to provide feedback on the grantmaking process, their experience, and the results of the projects or programs that you fund
- ❖ To reinforce youth involvement
- ❖ To see the difference you are making in your community.

## THE BASICS ABOUT EVALUATION

### *What is it?*

Basically, program evaluation is a planned, systematic process of collecting and analyzing data to help you understand the impact of your work and discover how you can become more effective. (There are some other useful evaluation terms in the attached glossary.)

There are lots of different kinds of evaluation. There are evaluation approaches like formative and summative evaluation, participatory evaluation, self-evaluation, appreciative inquiry, and evaluation tools like surveys, questionnaires, focus groups, interviews. Different evaluation approaches and tools suit different situations. In some cases, government departments or funding organizations may require a specific method of evaluation. In all walks of life, and particularly in grantmaking and community development, there is more and more emphasis on accountability and transparency – understanding the impact of your work and sharing that information openly.

This set of tools is focused on structured self-assessment and learning. We've tried to keep it simple, clear, and manageable for all kinds of groups.



### *Who does it?*

Evaluations can be conducted by internal evaluators or external evaluators. There are pros and cons for each approach.

<b>Internal Evaluation</b>	<b>External Evaluation</b>
Staff or volunteers inside the organization take on the task of evaluation. (Sometimes an evaluator position is created.)	Evaluators come in from outside the organization to conduct the evaluation.
Evaluator(s) may have limited evaluation experience.	Have specialized evaluation expertise.
May have limited time to devote to evaluation.	Will likely be a significant cost to the organization.
Evaluator(s) know the program's goals, history and achievements in depth.	Evaluator brings a fresh perspective to the assessment.

Both internal and external evaluations can be useful and credible if the tools and process are well designed to fit the situation.

This set of tools is designed for internal evaluation by YACs. It is expected that a group of people involved in the YAC will work together to plan and implement their evaluation process, using these tools as a guide. You may want to identify someone to lead, or establish a committee to lead, the evaluation process; however, everyone should be involved either as evaluators, participants in evaluation, or part of the team that examines the information collected and uses that information to make adjustments to your projects and programs. (There are also other tools and different approaches to evaluation in the reference section of the toolkit.)

## WHAT ARE WE EVALUATING?

YACs can evaluate their work at a number of levels:

- ❖ **Individual grants:** evaluation can help assess what the grant recipient did with the grant, its effectiveness, and whether it met its stated objectives, who benefited from the grant and how, and what the grant recipient learned about its program. *For example: you made a \$300 grant to a school breakfast program. How many students benefited? Is there evidence that having breakfast improved health or school performance? Did the school learn something about providing the breakfast program that would help others improve their program?*
- ❖ **The grant program as a whole:** evaluation can help assess whether the set of grants the YAC provided achieved the goal the YAC set out for its granting. What did the YAC learn about its granting process that could improve the next round? Has the experience of granting sharpened your YAC's grantmaking focus? *For example: your YAC decided that it wanted to help low-income kids. You made ten grants. You can find out how many grants actually targeted low-income kids and if your process encourages the best grant ideas. With this experience under your belt, you may see ways to change the focus of your grants next time.*
- ❖ **The YAC experience:** evaluation can help assess how individual YAC members feel about their YAC experience, what they are learning, and how the experience could be improved for individual YAC members. *For example, do you know whether all your YAC members hope to gain the same thing from participating? Is everyone satisfied (including the "quiet types")?*
- ❖ **The YAC as a whole:** evaluation can help assess whether the YAC is achieving what it set out to achieve, whether it is reaching the youth it wants to reach, whether it has maximized its connection to the community foundation and to the community, etc. *For example: Does your YAC have clearly stated goals and does everyone agree with them? Does the community foundation understand and support your work? Are you losing or gaining members? Do you know why?*

The tools in this kit will help you evaluate all four levels above and begin to answer those questions. Every YAC will have other specific questions it wants to answer about its effectiveness; you can adapt the tools in this kit to include what's most important for your YAC to assess and improve.

## LEVELS OF EVALUATION FOR YACS

- ❖ Individual grants
- ❖ Grantmaking program as a whole
- ❖ The individual YAC experience
- ❖ The YAC program as a whole

### When should we evaluate?

Evaluators refer to two kinds of evaluations: summative and formative. Basically, summative evaluations take place at the end of a program or activity. Formative evaluations take place while the program is still operating.



The tools in this kit are meant to be used in a formative way: to help your ongoing YAC programs assess how they're doing and help you make adjustments. They don't all have to be used at once. Build a timetable for using each of the tools.

For example, if your YAC makes grants once a year, you might evaluate your granting at the end of that annual cycle. If you grant throughout the year, pick a 12-month period that makes sense in the ebb and flow of work. And even though you evaluate your grants every year, you might choose to evaluate the internal workings of your YAC every two or three years – you don't have to do everything at the same time. Think about when people have time to work on evaluation, who is available to help, what other pieces of evaluation you would combine with the granting report, etc. Your overall timetable will depend on your specific YAC's activities.

### ***Not Just Numbers!***

Facts and figures are part of the equation, but measuring the effectiveness of your project or program is also about learning from personal stories. Your evaluation plan should capture participant stories from numerous perspectives. Different age groups, genders, cultures, income levels all experience things differently -- which results in a rich variety of suggestions on how to improve projects or programs, each voice deserving to be heard as much as the next. This toolkit helps you capture pictures and personal stories that describe how your YAC is making a difference in someone's life.

### ***What's the end product?***

Most YACs will summarize their findings and learnings in an evaluation report. The report might include the main findings from each tool you've used, a summary of suggestions that were made to improve your programs and processes, and the evaluation committee's recommendations for changes. Your report might also contain one or two of the most compelling stories and pictures you collected. If you've identified great ideas or "promising practices", include them too.

### ***Who will use our evaluation information?***

Your evaluation report or recommendations can be shared with your community foundation board and staff, and with other YACs across the country (be careful not to reveal confidential or identifying information, though) on CFC's YIP Canada's website. Some of the information will also help to build a database on YAC activity across the country – that aggregate information will be of interest to funders and other organizations working with small grants and with youth engagement.

### ***But...it Ain't Over Till it's Over...***

Even the best reports can stay on a shelf. You need to follow-up on your evaluation to make sure that your YAC actually makes the improvements that were identified. And plan for YAC self-assessment at regular intervals – maybe every 3 or 4 years – to make sure that you continue to learn and improve. There's always a way to work smarter!

## **TIPS FOR ASSESSING EFFECTIVENESS:**

- ❖ Create an evaluation committee and make an evaluation plan.
- ❖ Decide what information you need to collect to better understand your projects and programs.
- ❖ Gather both quantitative and qualitative information. Include storytelling and photos.
- ❖ Analyze the results. This information will help you learn what to change to achieve your YAC's goals and respond to needs better.
- ❖ Document your findings and learnings in a report.
- ❖ Plan for continuing learning, adjustment, and evaluation.

## Appendices

### GLOSSARY OF TERMS



**Objectives** – specific and measurable statements of what an organization would like to accomplish

**Goals** – purpose or objective to which a project or organization is directed

**Evaluation** – the process of making an assessment based on data

**Formative evaluation** – an ongoing process whereby information is added continuously through a systematic approach and analyzed throughout the evaluation period

**Summative evaluation** – evaluation methods that focus on the final results or product of the work of a group and most often use quantitative measures

**Quantitative measures** – involves the collection of information and data, which provide numbers or statistics regarding the project for the purposes of making an assessment

**Qualitative measures** – involves the collection of information and data, which provide descriptions of the project for the purposes of making an assessment

**Outcome** – the end result of a project



## RESOURCES ON EVALUATION

### YOUTH IN PHILANTHROPY & COMMUNITY FOUNDATIONS OF CANADA

#### Youth in Philanthropy Canada's website

[http://www.yipcanada.org/index\\_e.cfm](http://www.yipcanada.org/index_e.cfm)

*The YIP Canada website contains information about youth forming YACs, coming together to raise money, building endowment funds and making grants to local youth projects. The youth are in their teens and twenties, have a lot of ideas and energy to bring to the table, and want to make a difference. This site allows other youth to see pictures of projects and read about success stories.*

#### YIP Tips, Sample Materials from YACs, Global YIP Resources, Communication & Media Resources, How-to Resources

[http://www.yipcanada.org/resources\\_e.cfm#cat4](http://www.yipcanada.org/resources_e.cfm#cat4)

*Within the Youth in Philanthropy Canada website, there are many resources to help youth such as quick tips, sample materials from YACs, and communication and media resources. All of these resources are here to help youth!*

### **CFC Resource Manual: Engaging Youth in Philanthropy**

[http://www.cfc-fcc.ca/bookstore/cfc\\_publications.cfm#fund\\_youth](http://www.cfc-fcc.ca/bookstore/cfc_publications.cfm#fund_youth)

*This toolkit is packed with practical suggestions and examples to guide youth, Board members and adult advisors through all the stages of starting, running and supporting youth in their work with local community foundations.*

### **CFC Resource Manual: Neighborhood Grant-making Toolkit**

[http://www.cfc-fcc.ca/bookstore/cfc\\_publications.cfm#fund\\_youth](http://www.cfc-fcc.ca/bookstore/cfc_publications.cfm#fund_youth)

*This toolkit uses the best practices from three Canadian community foundations covering: How to start - Working with your community - Developing partnerships; Advice on administrative and financial resources; and tips on marketing. It also includes a list of resources, templates and guidelines.*

### **CFC Web Resource, GrantBenefit**

<http://www.grantbenefit.org>

*The GrantBenefit website offers resources and practical tools to help community foundations begin to assess their benefit to the community. There are more than 50 tools and resources from experts in the field that will help youth and adults sharpen their approach to assessment.*

## **OTHER EVALUATION RESOURCES**

### **Youth Grantmakers, Council of Michigan Foundations**

<http://www.youthgrantmakers.org>

*The Youth Grantmakers resource includes valuable tools such as Youth Grantmakers Contribute to Community Foundation Growth, a publication to help engage youth in community foundation development, and Participatory Evaluation with Young People, a workbook for youth people who want to develop knowledge for action and change, whether through program evaluation, community assessment, policy analysis, or other studies.*

### **Youth In Focus**

<http://www.youthinfocus.net/>

*This is a youth organization working to partner with adults and engage underrepresented youth in youth-led research, evaluation and planning toward social justice. One of their projects was “Youth IMPACT”. The evaluation report is at [http://www.dcyf.org/Pubs/youth\\_IMPACT/final\\_YI\\_eval\\_report.pdf](http://www.dcyf.org/Pubs/youth_IMPACT/final_YI_eval_report.pdf).*

### **W.K. Kellogg Foundation, W.K. Kellogg Foundation Evaluation Handbook, 1998**

<http://www.wkkf.org/default.aspx?tabid=75&CID=281&NID=61&LanguageID=0>

*This Evaluation Handbook is designed to encourage communication about the role evaluation should play at the project level, and encourages youth and adults to think differently about evaluation, so that evaluation can move from a stand-alone monitoring process to an integrated part of program planning. This resource helps youth and adults lead more effective programs, and provide learning opportunities and knowledge of what works.*



**Innovation Center for Community and Youth Development, Reflect and Improve Tool Kit, 2005**

[http://www.theinnovationcenter.org/r\\_planning.asp](http://www.theinnovationcenter.org/r_planning.asp)

*This practical, easy-to-follow tool kit is designed for adult and youth at youth development organizations. It provides tools to help assess organizational needs for evaluations, design evaluations to fit organizational goals, and use evaluation data to report to funders and other community stakeholders. The tool kit includes real world case studies from community organizations, interactive activities and step-by-step instructions, and prepares both youth and adults to engage in a process of reflection, learning, analysis and decision making.*

**Grantcraft, Evaluation Technique Series**

<http://www.grantcraft.org/index.cfm?fuseaction=Page.viewPage&pageID=742>

*The Evaluation Technique Series helps grant makers understand some of the newer evaluative approaches and weigh their advantages. Each briefing note will explain the basics of one technique and answer some common questions about its use. A mini-case, based on one grant maker's experiences, is featured in each guide.*

**The Women's Research Centre, Keeping on Track: An Evaluation Guide for Community Groups, 1990**

*This Evaluation Guide explains how evaluation can be useful, how to prepare for an evaluation, how to develop an evaluation design, how to collect, analyze and use the evaluation data, and guidelines for self-evaluation.*

**Imagine Canada, Project Evaluation Guide for Nonprofit Organizations, 2006**

<http://www.imaginecanada.ca>

*This comprehensive new resource helps organizations learn how to create precise evaluations and build evaluation skills into the capacity of their organization.*

