

# STATE OF EVALUATION IN CANADA

## SOCIAL SERVICES CHARITIES

### Introduction

Social services charities provide social and human services (excluding medical services) to populations including children, youth, families, the elderly and the disabled. They also provide emergency assistance and income support / maintenance. At present, there are approximately 15,200 social services charities, accounting for about 18.0% of all charities and making them the second largest sub-sector behind Religion.

### What aspects of their work do they evaluate?

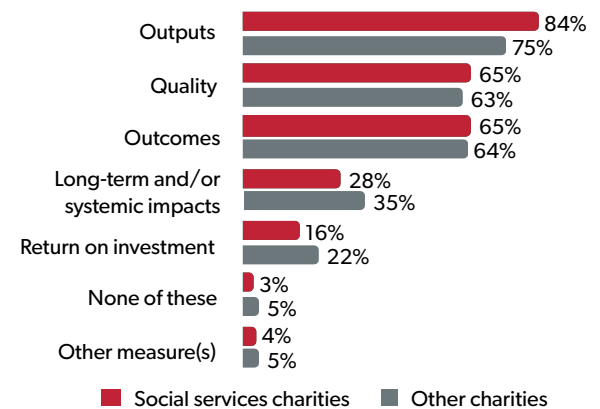
As with other types of charities, social services charities tend to place the greatest emphasis on evaluating more fundamental aspects of their work, such as outputs, quality and outcomes.<sup>1</sup> Strong majorities of social services charities measure these aspects of their work. Much smaller proportions evaluate either their impact or the return on investment of their work. Social services charities differ from other sub-sectors in emphasizing output measurement and de-emphasizing evaluation of impact and return on investment.

### What techniques and resources do they use to evaluate their work?

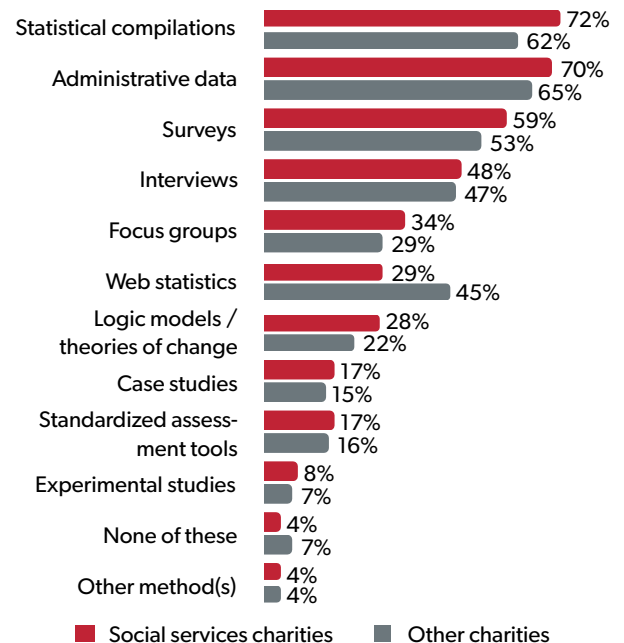
Social services charities draw on a very wide range of techniques and resources to evaluate their work and are at least as likely as charities in other sub-sectors to use almost all measures. On average, they use 3.8 individual measures (vs. 3.7 for other types of charities).

In terms of specific types of evaluation measures used, they tend to emphasize quantitative techniques including statistical compi-

### Aspects of their work evaluated



### Measures used to evaluate their work



<sup>1</sup> *Outputs* were defined as how much the charity did (e.g., number of events, patrons attending, etc.), *outcomes* as the direct effects of its work on the people or cause it serves, *quality* as how well it carried out the work, *impact* as broader long-term or systemic effects of the 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.

lations of services delivered, administrative data and surveys. Interviews are less commonly used, but still rank fairly highly. Compared to charities in other sub-sectors, social services charities are more likely to draw on statistical compilations and logic models / theories of change. They are also modestly more likely to draw on surveys and focus groups, but significantly less likely to use web statistics.

## How do they use evaluation results?

Social services charities use evaluation results in many different ways. Overall, they use evaluation results about as intensively as other types of charities, averaging 9.2 individual uses (vs. 9.1 for other sub-sectors).

Looking at the general ways they use evaluation results, the vast majority of social services charities use them for some form of reporting (96% use results this way) and to inform organizational or program-level decision-making (95%). Somewhat fewer use results to learn about their work (86%), but only about half use them to measure organizational performance (56%).<sup>2</sup> Overall, these levels of general use are very comparable to those observed in other sub-sectors.

Looking at specific uses for evaluation results, social services charities stand out as being more likely than other charities to use results to report to key audiences, including senior management and peer organizations. At least in part, this seems likely to be related to the fact that social services charities responding to the survey tended to be somewhat larger than other charities and to the fact that the types of work social services charities commonly engage in are broadly based and frequently span organizational boundaries.<sup>3</sup> In the area of decision-making, they are more likely to draw on evaluation findings to plan or revise general organizational strategies but less likely to use them to guide resource allocation decisions. Finally, social services charities are also somewhat more likely to use evaluation results to inform or influence government.

## Uses of evaluation results



<sup>2</sup> The comparatively small percentage of charities using evaluation results to monitor organizational performance is likely driven mainly by the fact that the survey devoted only two questions to this application of evaluation results.

<sup>3</sup> Responding social services charities were about half again as likely as others to have 10 or more paid staff (47% vs. 31% of other charities).

## Staffing for evaluation

In social services charities, as in other sub-sectors, responsibility for evaluation tends to be shared across multiple positions / roles. Most commonly, it involves the charity's most senior leader and those directly engaged in program delivery, but staff and volunteers in a wide range of roles may also be involved.

Roughly one quarter of social services charities have at least one staff member primarily devoted to evaluation, a somewhat higher proportion than in other sub-sectors. Similarly, the most senior organizational leader and those delivering programs are noticeably more likely to be involved in evaluation than in other sub-sectors. The chair and/or other board members are less likely to be involved, as are marketing and communications staff. Collectively, this suggests that evaluation is a major operational focus for leadership and may benefit from the specialization possible with larger staff sizes.

## Evaluation networks

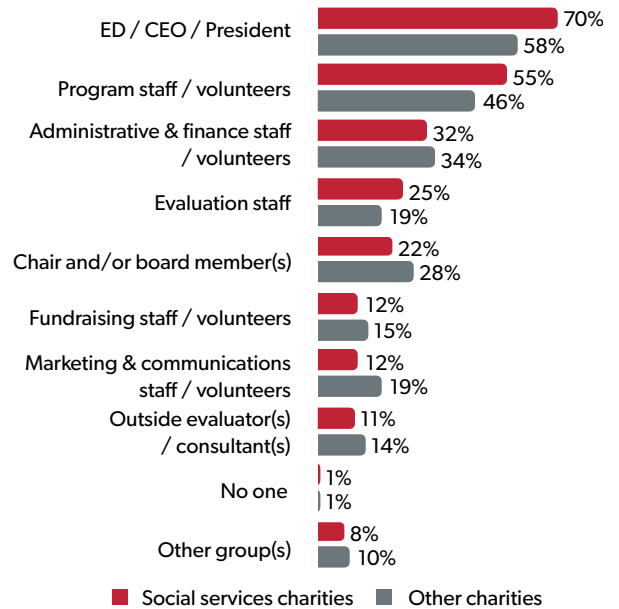
Just over a quarter of social services charities (28%) belong to some sort of formal or informal group, network or association related to evaluation, roughly in line with the norm in other sub-sectors.<sup>4</sup>

On average, social services charities that belong to these types of networks draw 2.5 individual supports from them (vs. 1.8 in other sub-sectors). Measurement and evaluation-related tools, training and participation in group evaluation initiatives or projects are the most common forms of support. Relatedly, charities belonging to such networks are more likely to use virtually all evaluation measures, particularly more involved techniques such as focus groups, surveys and standardized assessment tools. Help finding funding or external expertise to support evaluation are the least commonly provided supports, though still reasonably common. Compared to other charities, social services organizations are more likely to receive most forms of support offered by evaluation networks.<sup>5</sup>

<sup>4</sup> The range of evaluation-related relationships described by survey respondents is extremely varied, ranging from periodic consultations with groups of peer organizations through to long-standing formal membership in national umbrella groups. Many charities reported being in multiple relationships related to evaluation.

<sup>5</sup> Only help finding funding to support evaluation, obtaining external evaluation expertise and other forms of support not specifically mentioned by the questionnaire are not statistically significant.

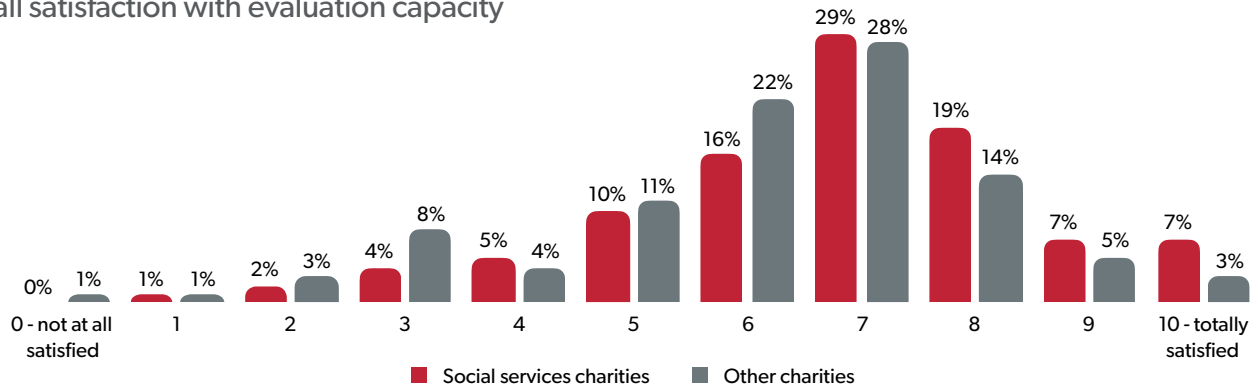
## Staff positions involved in evaluation



## Resources & supports received from evaluation networks



## Overall satisfaction with evaluation capacity



## Opinions about evaluation

Overall, social services charities are significantly more satisfied than other charities with their capacity to evaluate their work and apply evaluation findings. Using the 11-point scale depicted above, their average satisfaction score was 6.8 (vs. 6.2 for charities in other sub-sectors).

The vast majority of social services charities see a need for evaluation in order to know they are achieving their objectives and most see sufficient value in the activity to justify the resources they devote to it. However, most also believe the data they collect is not used to its fullest potential. Charities are essentially split on the issue of whether they face too much pressure from external entities to evaluate their work. While they are more likely

to believe evaluation does not cause problems in their relationships with those they serve, fully a third of social services charities agree this can be a challenge.

Overall, the opinions expressed by social services charities are quite consistent with those expressed by other types of charities. There are only two statistically meaningful differences from other sub-sectors: social services charities are somewhat less likely to be undecided as to whether measurement and evaluation activity poses relationship challenges and they are somewhat more likely to believe their organization is making effective use of the evaluation data it collects.

## Opinions related to evaluation



## The role of external evaluators

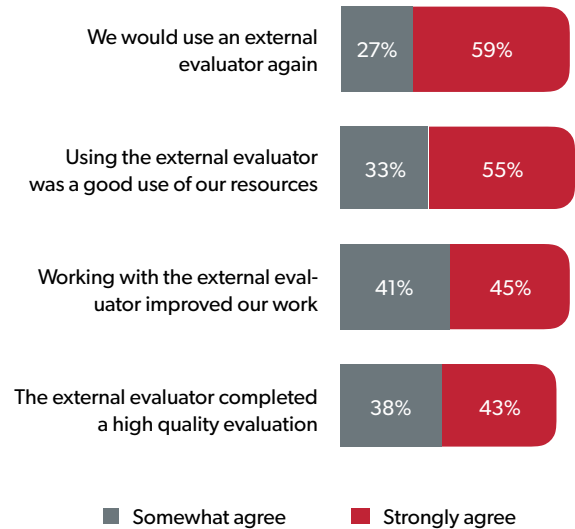
Just under one in five social services charities (19%) worked with an external evaluation consultant or organization over the previous year (vs. 23% of charities in other sub-sectors). Social services charities do not appear to be drawing on external expertise to compensate for lack of dedicated evaluation staff. To the contrary, charities without dedicated staff are actually less likely to engage external expertise (16% vs. 26% of charities with dedicated staff). While lack of dedicated staff does not appear to be a motivator, dissatisfaction with their evaluation capacity may be. The average satisfaction score for social services charities engaging external expertise is significantly lower (6.3 vs. 6.8 for charities not drawing on external expertise).

Social services charities engaging external evaluators appear to have somewhat different opinions about evaluation and its role. Substantially all social services charities that engage outside evaluation expertise (99%) believe that they need to measure and evaluate their work to know that it is working (vs. 87% of charities not engaging external evaluation expertise). Similarly, charities engaging external parties are more likely to believe that evaluation provides a good return for the time and effort they invest in it (80% believe this vs. 65% of charities not engaging external parties).

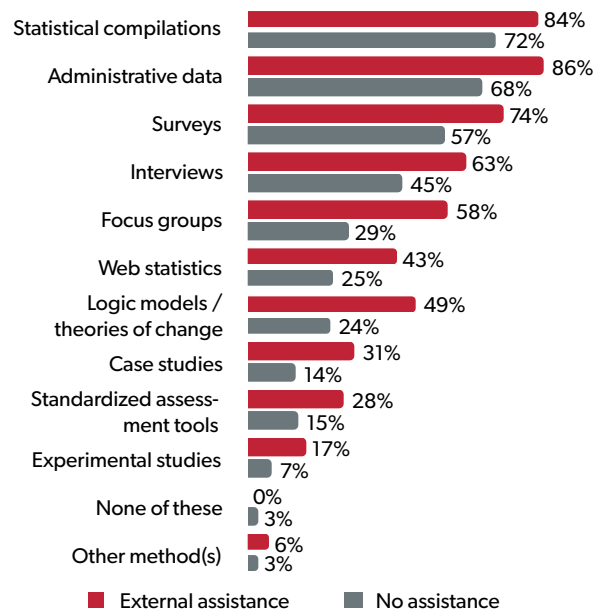
Overall, social services charities engaging external evaluators appear to be very satisfied with the experience. Just under nine in ten would use an external evaluator again in the future, believe that using an external evaluator represented a good use of resources and think it improved their evaluation work. Slightly fewer say that the external evaluator completed a high quality evaluation, but the proportion expressing satisfaction remains very large. These responses mirror those of charities in other sub-sectors.

Social services charities are somewhat more likely to measure particular aspects of their work if they engage external evaluators. They are more likely to evaluate each of their outputs (95% vs. 84% of charities not engaging external expertise), outcomes (80% vs. 63%) and the impact (23% vs. 15%) of their work. The same pattern holds true for the use evaluation measures, particularly some more involved techniques such as focus groups, logic models / theories of change, etc.

## Opinions about external evaluators



## Evaluation measures by presence of external assistance



## Enablers and barriers

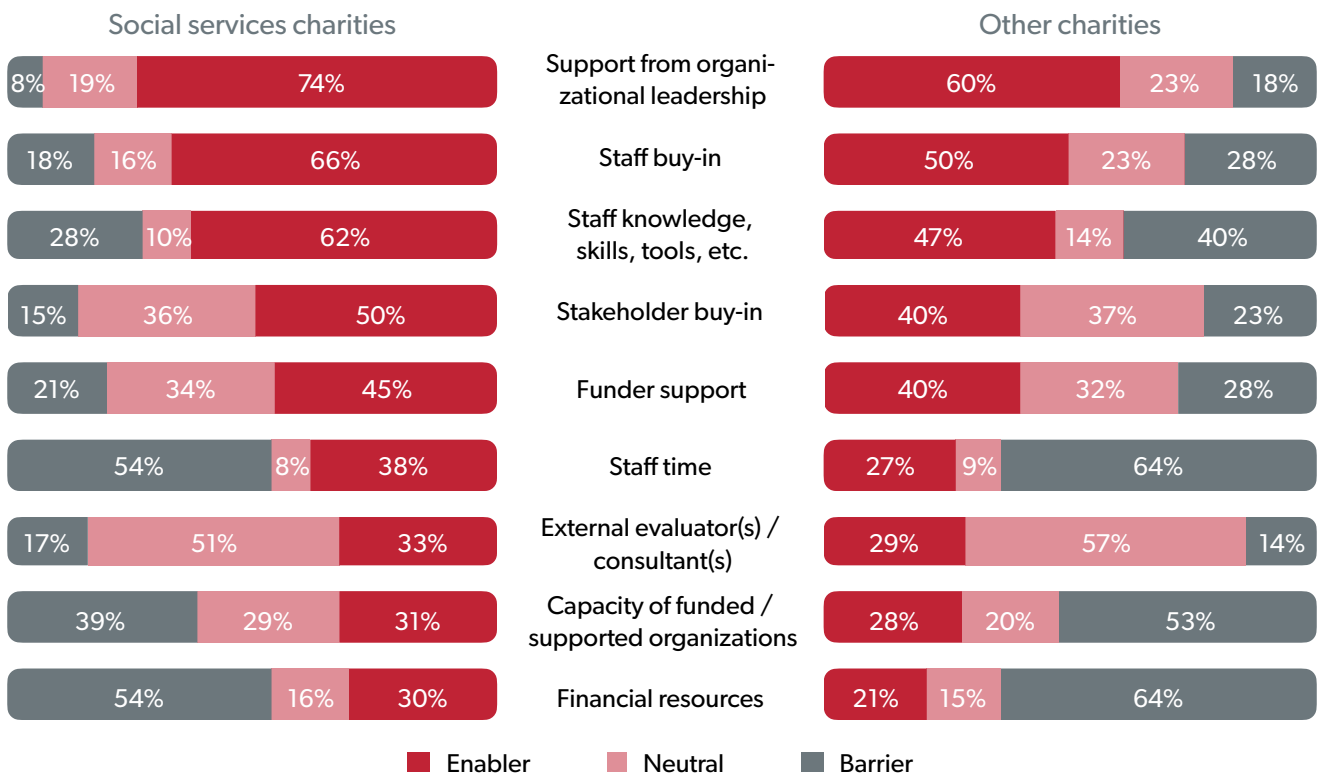
Survey respondents were asked whether any of nine potential factors functioned as enablers or barriers to effective evaluation for their organization. For social services charities, staff-related factors are the most commonly reported enablers. Three quarters of social services charities view support from their organizational leadership as an enabler and approximately two thirds view staff buy-in and evaluation-related staff knowledge and skills as enablers. While charities in other sub-sectors are also quite likely to view these factors as enablers, they appear to be particularly potent among social services charities.

Social services charities also tend to view external buy-in and support from stakeholders and funders as enabling factors, though these seem to be somewhat less potent than staff-related factors. Social services charities are more likely than other types of charities to view stakeholder buy-in as an enabling factor. Opinions about the impact of external evaluators or consultants and the

capacity of funded or supported organizations are more mixed, with comparatively small percentages of organizations viewing these factors as enablers and somewhat larger percentages viewing them as having a neutral role (external evaluators) or even functioning as a barrier (funded / supported organizations). Compared to other charities, social services organizations are less likely to view lack of capacity among the organizations they support as a barrier.

Lack of financial and human resources are by far the most commonly reported barriers. Just over half of social services charities view each of these factors as a barrier to their evaluation efforts. While these factors are the most commonly reported barriers, they appear to be somewhat less potent among social services charities than in other sub-sectors. While it is impossible to be certain of the reasons for this, at least some of it is likely due to the generally greater levels of investment in evaluation by social services charities.

### Enablers and barriers of evaluation



## Methodology

**SUMMARY.** The survey was conducted between May 10 and July 8, 2018. 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 rates. Survey invitations were sent to 7,529 charities from across Canada, including 2,531 social services charities. In total, we received 1,884 useable responses, including 623 from social services charities. Once e-mails known not to have reached the intended recipient are taken into account, the net response rate was 24.6% (26.8% for social services charities).

**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. For more details on how the sample was constructed, please refer to the Methodology section of the national highlights report entitled *The State of Evaluation in Canada*.

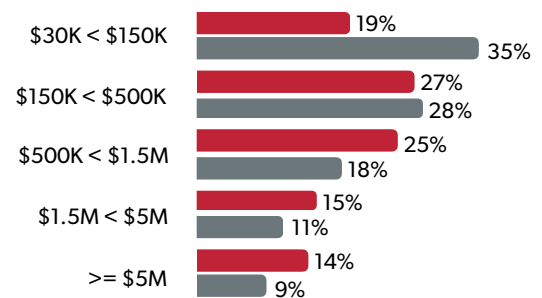
**RESPONSE RATES.** Response rates varied according to organizational characteristics. They were lower among charities with annual revenues less than \$150,000, located in British Columbia or working in the education or grantmaking, fundraising & voluntarism sub-sectors. Response rates were higher among charities with annual revenues between \$500,000 and \$1,499,999, 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 or-

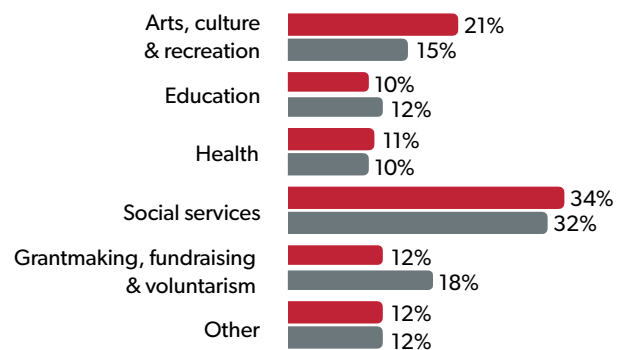
der to account for differences between the survey sample and the population of in-scope charities and for variations in the response rate. Population counts were based on the 2016 distribution of registered charities. For more details of how weights tended to vary by organizational characteristics, please refer to the Methodology section of the national highlights report.

### Weighted and unweighted distributions of survey respondents by key variables

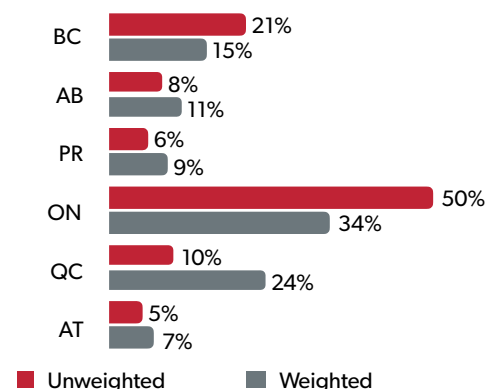
#### Annual revenue size



#### Sub-sector



#### Region





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David Lasby

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Imagine Canada

65 St. Clair Avenue East, Suite 700

Toronto, Ontario, Canada M4T 2Y3

T 416 597 2293 | F 416 597 2294 | W [www.imaginecanada.ca](http://www.imaginecanada.ca)

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For more information about evaluation practices among Canadian charities, please see our national highlights report *The State of Evaluation: Measurement and evaluation practices in Canada's charitable sector* available at <http://imaginecanada.ca/resources-and-tools/research-and-facts/state-evaluation-canada>.

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

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