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# Evaluation Findings, Lessons Learned and Implications

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## BACKGROUND

In 2010, CompassPoint hosted its 23<sup>rd</sup> Annual Nonprofit Day conference in San Francisco. It was attended by 443 people representing a wide range of experiences and perspectives from both the nonprofit and philanthropic community .

For the 2010 Nonprofit Day, CompassPoint used its Theory of Change (which was adopted by the Board in November 2010) to frame the design and intended outcomes from this conveying. Specifically this included using the strategies, values and expected changes as reference point for conveying objectives and overall and session design. To assess the effectiveness of the application of this model to the experiences of participants and staff, assessment tools were developed, administered and analyzed for the overall conference as well as the individual sessions.

This report presents those findings organized by a set of guiding questions identified as most important to communicate to staff, Board and other partners in terms of understanding the impact and lessons learned from this effort.

## GUIDING QUESTIONS

This document provides an overview of the ratings and comments participants provided about the Conveying overall as well as Individual Sessions. The purpose of this structure is to unify the comments given the wide range of offerings, participants, expectations and learning styles into a report that provides CompassPoint and its key partners in this effort information that provides them a sense of to what degree they were successful in their desired outcomes, a sense of participant experience and learning as well as to shape what's next for Nonprofit Day 2011 and other such conveyings.

Following are the overarching questions which frame the analysis and presentation of findings:

1. To what extent were the intended outcomes of Nonprofit Day met?
2. In what ways did the theme contribute/influence participants'/staff/presenters' experience?
3. What are key findings/implications for next year and/or other conveyings?
4. What have we learned about CP conveying strategies and contribution towards anticipated change?

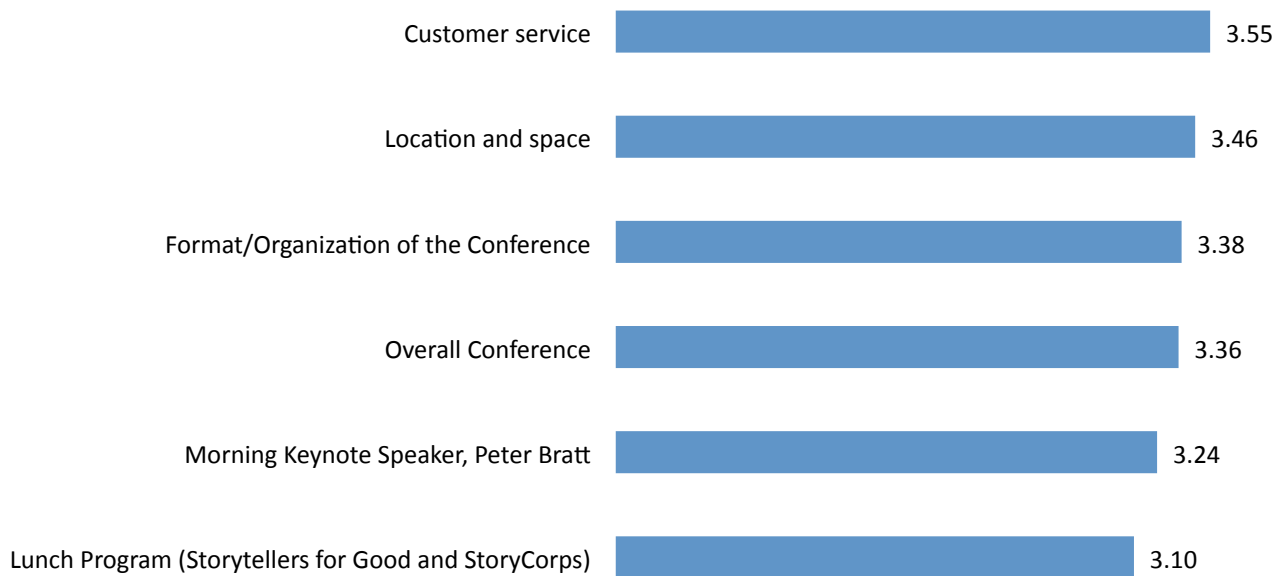
## ANALYSIS

The following sections are a synthesis of the qualitative and quantitative data gathered throughout Nonprofit Day as well as the debriefs and reflections of staff post.

### Nonprofit Day Outcomes

Participants were asked to rate on a scale of 1 to 4 -- where 1 = strongly disagree and 4 = strongly agree - their agreement with statements describing the extent to which the conference overall and sessions individually were effective at meeting stated objectives.

Figure 1. Extent to Which Nonprofit Day Met Objectives: Format and Logistics

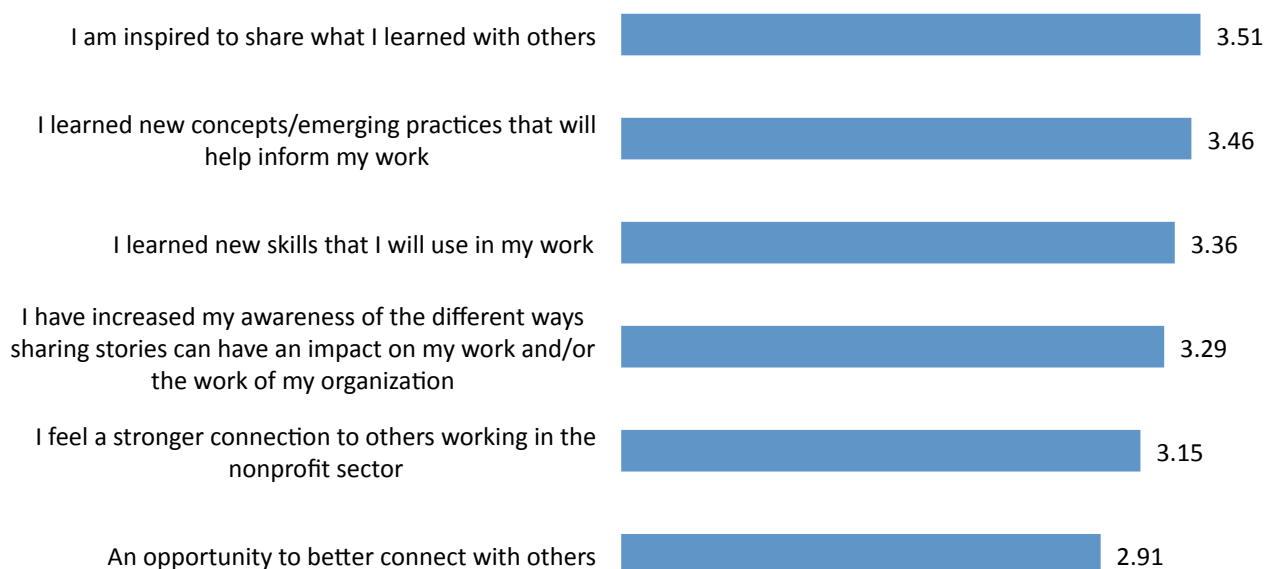


The overall conference objectives related to format and logistics were rated as highly met by participants. In addition to the quantitative data presented above, participants frequently noted how well the conference was organized, how smooth all logistics seemed, and the friendliness and helpfulness of staff and volunteers. Additionally, many participants commented on how helpful it was to have customized schedules on the backs of namebadges and the ease with which participant registration flowed in the morning.

The morning keynote speaker and lunch program received more mixed evaluations, with a substantial minority of participants questioning the relevance of Peter Bratt's keynote presentation to the work of nonprofits. However, many participants also felt inspired by his presentation and appreciated the candor with which he spoke.

Staff feedback highlighted the somewhat uneven distribution of onsite workload, where some staff felt underutilized during the day and other staff felt too busy. All staff noted appreciating the opportunity to participate in general sessions, including the morning keynote address and lunch presentation.

Figure 2. Extent to Which Nonprofit Day Met Objectives: Learning and Connecting

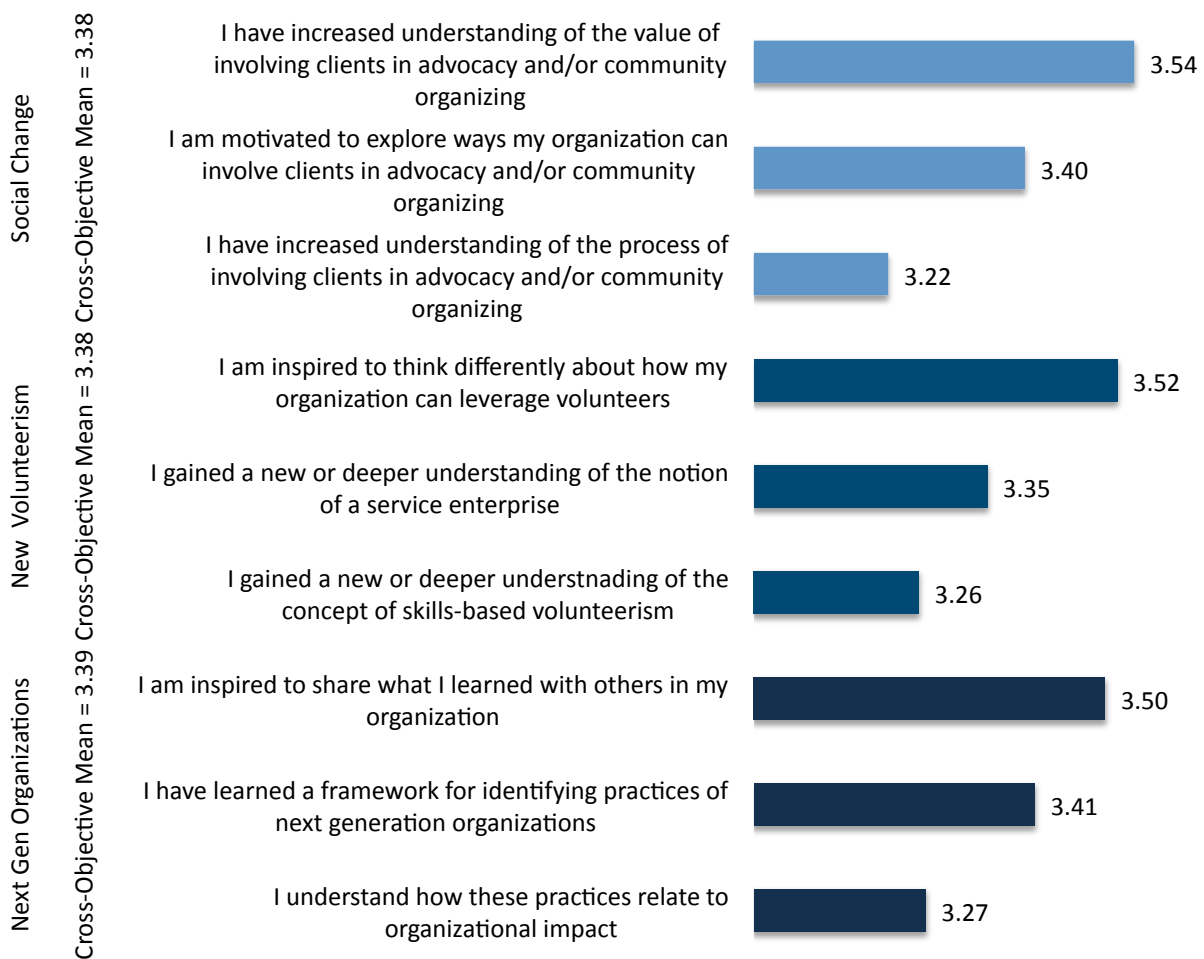


The objectives related to Learning and Connecting were met to a slightly lesser degree than logistical objectives. In both quantitative and qualitative evaluations, participants noted that Nonprofit Day was inspiring and, as in years past, presented participants with new information regarding emerging concepts and sector trends. Despite efforts to facilitate networking through new approaches to the raffle (optional MadLibs exercise) and a networking happy hour reception post event, participants consistently commented that more networking opportunities could have been presented. Additionally, although longer breaks between sessions were built in to the program to allow for more unstructured networking, many participants noted that the breaks were too long and did not seem to see that time as an opportunity to better connect with others.

It is interesting to note that the objectives included in participant evaluations were extrapolated from the conference design framework rather than taken directly from it. This implies that the objectives to which the conference was designed were not explicitly stated nor evaluated. For reference, the objectives used in the design framework were:

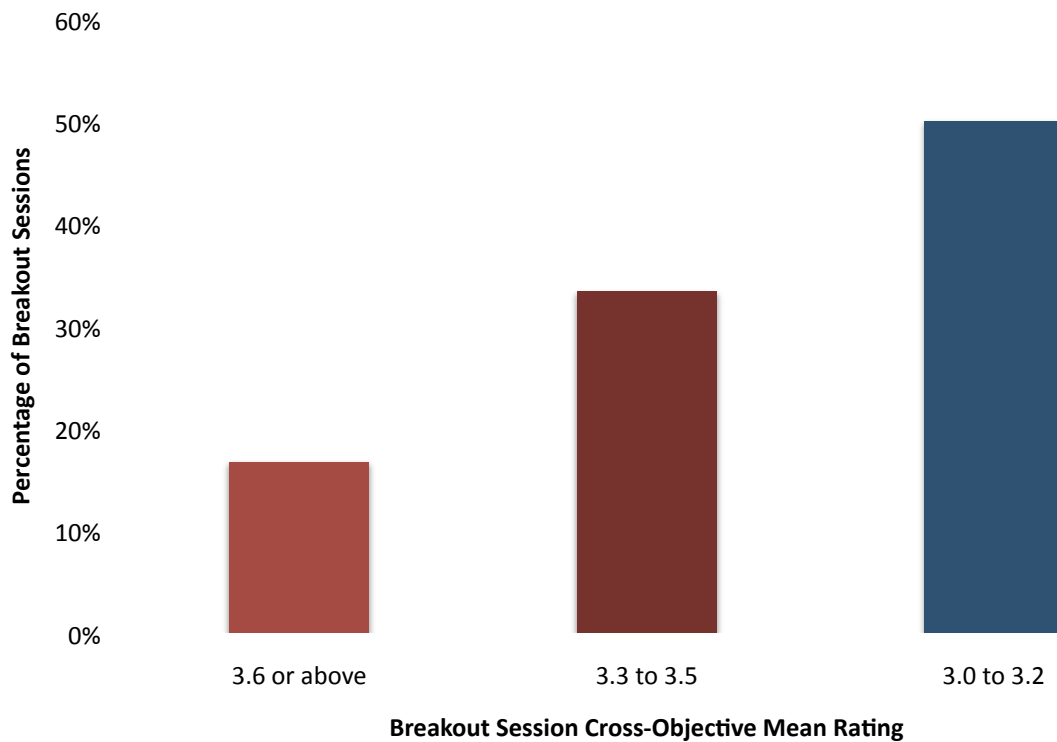
- Reaffirm (affirm) commitment to and working towards social equity
- Gain knowledge and increase awareness of information, practices, and policies that will advance the work of individuals and organizations
- Share and Learn from generational perspectives and experiences to further and inspire effective leadership practices
- Participants will have a better understanding of the importance/value participating in a network engaged in and/or a collaborative effort working towards social equity

Figure 3. Extent to Which Plenary Sessions Met Objectives



For each of the three plenary sessions, objectives, which were met largely, included those that sought to *inspire* or increase *understanding of the value* of a topic. Those objectives that received lower scores across all plenary sessions were those that evaluated the *application of skills and/or knowledge* learned. This may indicate the need to revisit the intended objectives of larger plenary sessions to be more focused on the sharing of new practices and sector trends with better follow up resources provided to participants so that they may learn how to apply these new theories and practices to their work outside of the plenary session. An alternative might be to use the breakout sessions as opportunities to build relevant skills to apply the concepts introduced in plenary sessions.

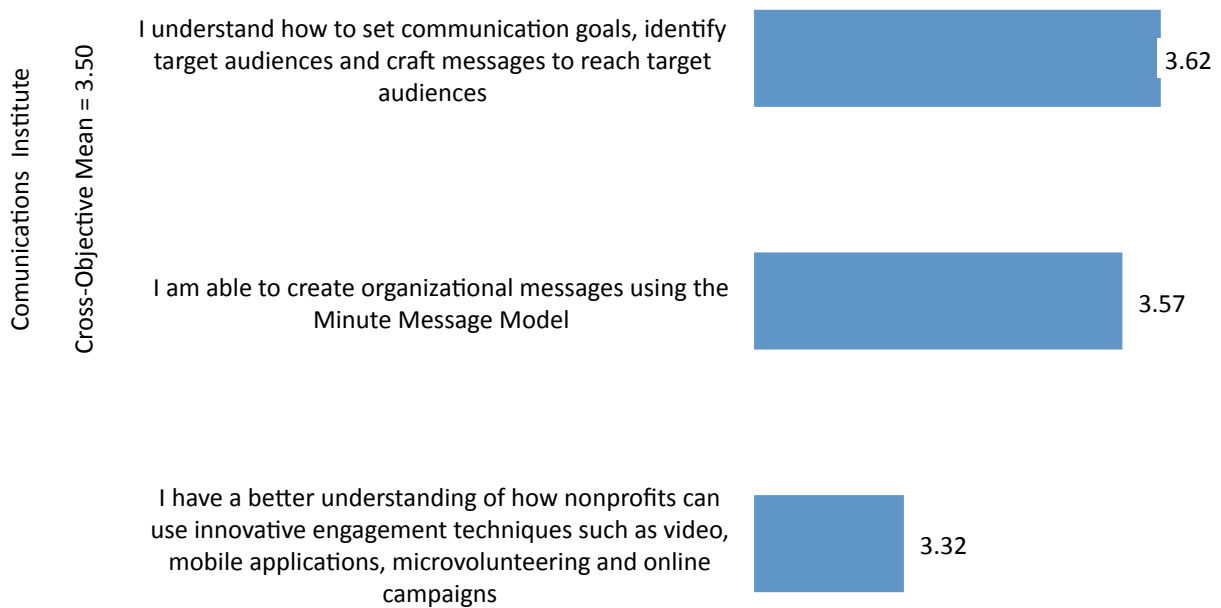
Figure 4. Extent to Which Breakout Sessions Met Objectives



There seems to be no relationship between a session better meeting objectives for internal presenters, newly recruited external presenters, and external presenters with whom CompassPoint is in an existing deep partnership. It is notable that the two sessions scoring 3.6 or above were presented by one CompassPoint staff and one former CompassPoint staff person. However, because CompassPoint staff did not present many sessions at Nonprofit Day 2010, this data may be somewhat skewed.

Partially because 2010 was the first year that breakout session presenters were asked to develop objectives for their 90-minute sessions, and because of the diversity of the experience levels and organizational backgrounds of session participants, sessions were evaluated somewhat lower on average than in past years. Some of the difference in the ratings may be attributed to the increased specificity and depth of the session evaluations rather than an indication of decreased session quality. As CompassPoint and its partner-presenters become more proficient at setting attainable and measurable objectives for conference sessions, quantitative evaluations will likely improve.

Figure 5. Extent to Which Communications Institute Met Objectives



The Communications Institute met stated objectives slightly better than did breakout sessions. This was likely a result of more time (3.5 hours over the course of a day rather than 90 minutes) spent with the same small group of 35 participants. Additionally, the outcomes of the Communications Institute focused more explicitly on building skills and honing techniques rather than inspiring or connecting. There was little thematic connection between the Institute and the broader conference, and staff debrief data raised questions about the value-add of including a “mini conference within a conference”. As typical of many large convenings, a few participants noted in their qualitative evaluations that the content was too basic.

### Contribution of Theme To Participant Experience

As in years past, the diversity of participants resulted in a mixed reception of the Storytelling theme. Based on qualitative evaluation data, many participants felt inspired by the Storytelling theme and more connected to each other and the work of the nonprofit sector. This was an objective explicitly stated as “I have increased my awareness of the different ways sharing stories can have an impact on my work and/or the work of my organization” and was evaluated at 3.29. However, others felt that the theme was inappropriate for a management conference and had hoped to leave the day with more concrete, actionable storytelling strategies.

The high positive value of having a theme for the conference is seen through participant responses to the question “The best aspects of Nonprofit Day were:”

- The weaving of the theme throughout the day
- The unique stories from nonprofit leaders on panels and in plenaries, and the inspiration I felt upon leaving the conference!
- The storytelling theme really made the day feel thematic, purposeful, and coherent.

Additionally, participants noted that having a unifying theme for the conference contributes to the coherence and flow of the day. The staff debrief also emphasized the positive value of having an explicit theme throughout the day. Staff suggested that the link between theme, outcomes, and program design be more explicitly communicated throughout Nonprofit Day speaker and sponsor recruitment as well as marketing.

### Key Findings/Implications for Other Convenings

**Using the CompassPoint Theory of Change** to develop a design framework at the start of conference planning was useful in guiding program design, flow of the day, and outreach activities. For future planning, continue starting by building a design framework and creating objectives for the day. To keep the framework as a guiding tool, revisit this framework throughout convening planning to ensure any new design elements are rooted in the framework, i.e. networking time, post convening activities, etc are intentional and intentionally executed. Additionally, this framework may guide in decision-making, for example in planning Nonprofit Day 2010, the goal of leveraging diverse participants gathering in one place contributed to the decision to increase the frequency and duration of breaks (unstructured “free” time) rather than adding additional breakout sessions.

**The need to communicate intentions and objectives** for the day more clearly from the start and throughout the planning and execution of the convening is a key finding, which we can infer from participant evaluation data, and was explicit in staff feedback. This communication needs to be consistent and clear to presenters, staff, funders, and participants. We may want to consider prioritizing intentions/objectives, for example to inspire and then to connect people and then to build skills (primary objectives, secondary objectives, etc).

***Further, consider the nature and role of session and overall convening objectives in contributing to the success of Nonprofit Day and other convenings.*** Related to this is whether certain objectives are better targeted for different parts of the convening and if there are ways to facilitate more aspects of the convening meeting all objectives largely. For example, in individual breakout sessions, Session Format, Materials, and Exercises received lower ratings than Overall Session, irrespective of the degree to which session objectives were met. Perhaps more interaction amongst participants in breakout sessions can better lead to skill building and networking, thereby meeting multiple objectives rather than focusing on just one. A possible consideration for future Nonprofit Day conferences is to include one or two overall objectives that can be consistently evaluated across convenings and over time. These outcomes may be linked to CompassPoint's Theory of Change and contribute to evaluating how the strategy of convening furthers CompassPoint's Anticipated Changes.

### **Convening Strategy and Its Contribution towards Anticipated Changes**

The primary Anticipated Changes that CompassPoint sought to move towards with Nonprofit Day were:

- Social equity efforts will have more effective leaders and managers
- A healthy pipeline of diverse leaders will exist and they will hold leadership roles in the sector
- Powerful teams and networks will develop
- Organizations will be well managed with adaptive systems, skills, and culture
- More organizations committed to social equity will collaborate with one another to further their agendas.

To that end, several design elements were intentionally built into the day. One such element is bringing groups of people together with more unstructured networking with the intent to give people more time to meet each other and/or reconnect. This may lead to the development of stronger networks and collaborations. To further this goal we used post-convening elements such as an online resource list and an electronic participant list. We may expand upon and/or enhance these elements in future years.

Building skills and knowledge through plenaries and breakout sessions increases the effectiveness of leaders and managers, contributes to the development of a healthy pipeline of diverse leaders, and may lead to well managed organizations with adaptive systems, skills, and culture. However, these were assumptions that we did not directly test with participant evaluations and more long-term data is necessary to evaluate truly, whether the way CompassPoint convenes directly contributes to these anticipated changes.

### **CONCLUSIONS AND NEXT STEPS**

- **Evaluation Data:** To support a more robust evaluation data set CompassPoint should explore more immediate online evaluation distribution and more encouragement of day-of evaluation submission. There may be potential to incentivize a higher response rate, perhaps through workshop discounts for evaluations submitted online. Custom evaluations for each session provided useful information and session presenters appreciated receiving the direct feedback.

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Additionally, there was value for both presenters and participants in having each session state objectives. For future convenings, maybe elicit session objectives from presenters earlier in the planning process and include high-level objectives in marketing materials and session descriptions on website.

- **Conference Theme:** Having a theme for the conference proved important – though CompassPoint might want to reconsider/revisit the *type* of theme chosen and how it is communicated to funders, presenters, and participants. While continuing weaving the theme into various parts of conference planning and day-of event execution—including incorporating thematic components into all sessions—there needs to be better communication about why a particular theme was chosen and its importance to the sector.
- **Advisory Committee:** Staff feedback on conference planning surfaced the suggestion of engaging an advisory committee to inform the theme, content of sessions, and/or potential presenters.
- **Conference Tracks:** Both participant and staff feedback indicates the potential benefits of building tracks into the day, either based on position/title/role in a nonprofit, sub-sector (i.e. health, housing, arts), or a topical track based on new or emerging sector trends.