



Catapult Access Innovation Fund

Build Phase Evaluation: Summary of Process and Lessons Learned

Background

Goss Gilroy Inc. (GGI) worked with RHF on the 'build' phase of the evaluation of the Catapult Access Innovation Fund. The specific focus was to identify a list of indicators which would be used to monitor and assess project outcomes, both for the current funded projects as well as for future funding themes and streams. The approach to our support was to strike a balance between discovering and demonstrating outcomes of projects that can inform the success at the Fund level, while recognizing and supporting capacity building of organizations to fulfill reporting requirements. We aimed to minimize burden on funded organizations by delving into and understanding their established data collection efforts so it could be leveraged to meet RHF's needs.

Purpose of this report

This report identifies and lays out the process adopted by GGI and lessons learned to support RHF in the build phase of the evaluation of the Catapult Innovation Fund. The process included the following five main steps and the following sections provide further details of each step and the associated lessons learned from implementation.

1. Initial communique and indicator survey
2. Secondary research on indicators
3. Capacity and awareness building workshop with funded organizations
4. Refining the list of indicators and reporting tool
5. Feedback workshops and finalization of the reporting tool

1. Initial Communique and indicator survey

The first task in this assignment was to establish indicators and reporting expectations for funded organizations within their funding agreements and to provide capacity development and support to funded organizations to meet these expectations. As such, our initial communication with the first cohort of funded organizations was to introduce GGI and our role with the project, as well as to engage them in a short indicator survey.

The indicator survey requested that they briefly explain their project goal, any quantitative and qualitative indicators they have already identified and how they plan to measure these during the project period. The funded organizations were asked to build on what they had already provided in their project application about their existing measurement and evaluation plans and were given three weeks to complete and return their survey responses.

All 12 funded organizations in the first cohort completed and returned their survey responses. Eight survey responses were submitted within the three-week time frame and the last of the



remaining responses was received about three weeks later. We provided the funded organizations with additional time, as needed, because it was important we received feedback from each one.

A report was prepared to provide a summary of the responses received against each question in the survey. The objective was to provide RHF with an overview of the funded organizations' existing monitoring and evaluation systems and areas that require targeted capacity building support to meet the Fund's reporting requirements. The detailed responses received from each funded organization were included as an Annex to the report for reference.

Lessons learned

The key takeaway from the survey results was that funded organizations differ in their knowledge, experience and expertise in results measurement, monitoring and evaluation. The survey provided good insights into the strengths and gaps in each organization which helped GGI customize its capacity building support in response to specific needs.

2. Secondary research on indicators

The focus of this task was to identify common outputs, outcomes and indicators that are used elsewhere in similar domains and relevant to projects working with youth. This task essentially comprised a very focused literature and grey literature review that sought to capture common and tested options for indicators. This resulted in a compendium of indicators that was used as the starting point for the development of RHF's own framework. GGI reviewed and incorporated additional indicators from the results of the indicator survey with the funded organizations and ESDC's Goal Getters reporting template so that RHF's own reporting requirements to its funder could be met through this framework.

The compendium of indicators was analyzed multiple times to identify the most relevant ones to RHF. This was an iterative process which included discussions and feedback from the RHF team. The indicators were also divided into different categories to enable ease of reference.

Lessons learned

One lesson learned in hindsight is that this step might have been more effectively accomplished if the task of the literature review had been to focus on theories of change. Frequently referenced pathways of change or intermediate outcomes could then have been presented to the program for shortlisting and further direction ahead of determining possible indicators for the program. To explain further, social issues are always complex. Correspondingly, literature on youth disengagement clearly indicates that there are many risk factors (for example, poverty, trauma, absence of a caring adult, mental health problems, past involvement with the child welfare or youth justice system, etc.) and many different pathways to youth disengagement (for example, racism or other forms of ostracism and exclusion, falling behind in school, limited opportunities/feelings of hopelessness, crises, inflexible or unsupportive school structure, etc.). Thus, paths to help address youth disengagement can take on many forms and target one or more of a wide variety of intermediate outcomes (for example, access to basic needs, crisis support, a caring adult, meaningful inclusion and voice, opportunities to develop and practice skills in a safe and supportive space, accompaniment through transition periods, etc.) that might then help lead disengaged youth to greater engagement and later re-engagement with education or employment. Though the literature review did in fact strive to identify intermediate outcomes, then group these by theme, and try to make these themes more visible through the ordering and categorizing of the indicator



list, earlier work and conversations around theories of change related to NEET youth could have helped add another layer of insight to later steps of refining the indicator list for the program.

It is better to begin with a broad list of indicators as opposed to a short-list. A wide review ensures the likelihood of capturing the key indicators and enabling relevance to the widest array of funding organizations. The process of paring down the indicator list with RHF was interactive and engaging, facilitating critical discussions on what was necessary to include.

3. Capacity and awareness building workshop

GGI first developed a short document titled 'Introduction to performance measurement'. This was circulated prior to the workshop with the aim to provide an overview of key concepts and develop a common understanding and foundation to enable monitoring, reporting and evaluation of funded projects. During the workshop organized with funded organizations, key points about performance measurement were further explained and discussed using specific examples and exercises.

During this first workshop, GGI also sought feedback on the initial list of indicators developed for the Fund to enable performance measurement and evaluation.

Lessons learned

The funded organizations did not have adequate time to review the initial set of indicators prior to the workshop date and so were only able to provide their initial reactions to the indicators that were presented to them during the workshop. However, this was serendipitous as it allowed the GGI team to explain the structure and rationale of the indicators in more detail during the workshop, providing more context to the funded organizations about the rationale for various indicators. Several funded organizations provided written feedback on the indicators following the workshop which demonstrated their high level of engagement and buy-in to the process.

4. Refining the list of indicators and reporting tool

Feedback received from the funded organizations during and following the first workshop, informed GGI's review and refinement of the list of indicators. This process was also iterative and involved extensive discussions within the GGI team and with the RHF team to help identify the most relevant set of indicators.

Based on the set of indicators identified, the GGI team developed an excel-based reporting tool. This tool set out the indicators under three broad headings – Administrative information; Inputs, Outputs and Profile; and Outcomes. Under each specific tab, relevant indicators were listed, with guidance provided on how to report against each indicator.

Lessons learned

The main lesson learned was the need to adopt an iterative and flexible process in the refinement of the indicators and development of the reporting tool. Each review done by the GGI team and the RHF team resulted in a number of revisions. This process was essential to ensure that the final tool met the specific reporting needs of RHF and the funded organizations.



Funded organization voiced appreciation that an objective of having them involved in providing feedback on an early list of indicators and later the reporting template was to help ensure that the data collection for the fund as well as the reporting would be meaningful for their own organizational purposes as well as not overly onerous on their resources.

5. Feedback workshops and finalization

The second workshops with funded organizations were organized to obtain feedback on the reporting tool, any additional guidance they required to complete their reporting and to potential areas of concerns or challenges they may face in the reporting process. The objective was to proactively identify any concerns and provide adequate guidance on specific indicators. The draft of the reporting tool was circulated to all participants well in advance of the workshop dates.

Following the feedback received from the funded organizations, GGI and RHF conducted another round of discussions to finalize the list of indicators and reporting tool.

Lessons learned

An important lesson learned was that these second workshops were conducted in smaller groups of funded organizations (including specific discussions with French speaking organizations) which allowed for a more in-depth discussion into specific indicators. Lastly, it was evident that there were differences in capacity and capabilities among funded organizations and the need for GGI to clearly elaborate the wording of each indicator and the guidance in the tool.

Interpretations or definitions of specific indicators can vary among funded organizations so it was critical to have this joint discussion to enable a common understanding of RHF's expectations.

The funded organizations differ in their capacities, capabilities and experience with reporting and associated tools so it is critical to clearly define each indicator and provide guidance for data input in the reporting template.

Funded organizations can be constrained in what they collect based on their own privacy and/or ethical framework (e.g., not asking specific demographic data) and, so, the template must include space for these organizations to explain why specific information cannot be captured/reported.