



RISE Partnership Evaluation

Prepared for Scattergood Foundation | August 17, 2022

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INTRODUCTION AND SCOPE

Introduction

Equal Measure has been the evaluation partner for the [RISE Partnership \(“RISE”\)](#), a three-year collaborative funding initiative intended to strengthen the nonprofit ecosystem in the Greater Philadelphia/Southern New Jersey region. The evaluation examined how RISE helped strengthen evaluation capacity among participating nonprofit organizations, engaged collaborative funders in supporting nonprofit capacity and resiliency, and ultimately supported the creation of a more vibrant regional nonprofit ecosystem. The below findings encapsulate the dual approach to evaluating RISE through the lenses of participant experience and co-investor engagement.

Participants reported that RISE programming increased internal evaluation capacity, supported networking among partner organizations, and shifted organizational mindsets. Participants indicated that RISE influenced both the individual participants and their organizations. They valued the opportunities for peer learning and the development activities, such as individual consultations, that supported key evaluation skills and capacity, and helped staff advance professionally within their organizations. The programming began to effect change at the systems-level, with the potential to influence the regional nonprofit and philanthropic ecosystem more broadly—all changes envisioned in the RISE Theory of Change (see Appendix 1). Participants increasingly recognized improved evaluation capacity could help them reach organizational goals and reported a desire for more collaborative funding opportunities.

The RISE Partnership demonstrated that co-investors, through collaboratively supporting a peer network focused on evaluation capacity building, can create conditions for participating nonprofit organizations to advance a learning culture and evaluative thinking. Co-investors who support this mindset shift can drive organizations to identify and prioritize measurable outcomes that more clearly focus and describe their organization’s impact. The RISE model’s approach to partnerships between funders and nonprofit organizations, if strengthened and sustained, has the potential to create more collaboration and less competition among both funders and nonprofits. Such galvanized partnerships might lead to the identification of better solutions to intractable, systemic inequities, and ultimately, a thriving regional ecosystem.

In this brief, we introduce the RISE Partnership and the evaluation scope, explore RISE participant and co-investor findings, and share emergent considerations.



ABOUT THE RISE PARTNERSHIP

The RISE Partnership¹ is unique in the Philadelphia/Southern New Jersey region for operating within a co-investor model with eight funders representing the philanthropic and corporate sector.² The co-investors pooled funding to support a nonprofit evaluation capacity training and consultation program facilitated by the Scattergood Foundation and The Consultation Center at Yale. Nonprofit organizations were divided between three cohorts (Table 1) based on a stage of evaluation capacity and whether they had previously received evaluation capacity training through the Building Evaluation Capacity Initiative (BECI)³. The three cohorts were named **Readiness, Implementation, and Sustainability**⁴.

Table 1. RISE Partnership cohorts were formed based on the organizations' evaluation capacity.

RISE Cohorts	Evaluation Capacity	Goals	Number of Organizations
Readiness	● ○ ○	Develop foundational evaluation skills and competencies for continuous learning.	72
Implementation	● ● ○	Develop evaluation capabilities and create organizational cultures of evaluation and continuous learning.	15
Sustainability	● ● ●	Sustain and expand organizational cultures of evaluation through evaluation partnerships and learning in the regional ecosystem.	46

Readiness Cohort organizations were in nascent stages of evaluation capacity. They had built and stabilized their program operations but needed more time to conceptualize a logic model and plan out evaluation activities. Implementation Cohort organizations were assessed by RISE as more “mature” in their organizational capacity than Readiness Cohort organizations. They were mid-size organizations and were more prepared to strengthen data collection activities, as well as build more internal capacity and an evaluation culture and mindset in their organizations. Sustainability Cohort organizations had graduated from the BECI, the forerunner to RISE, and had embedded sustainable evaluation and learning cultures, and continued connection through peer networking opportunities.

BECI established a learning agenda for participants to embed evaluation capacity principles into programming, operations, and reporting. RISE built on the threads of peer learning and individual consultation in a single cohort model and expanded the pool of eligible organizations at multiple stages of evaluation capacity. Organizations tended to be funded already by one or more of the RISE co-investors and applied to a RISE cohort based on their evaluation capacity and experiences. Of note, within this document, “cohort level” refers to activities occurring within a single cohort.

¹ The RISE Partnership is based on the Edna McConnell Clark Foundation's [PropelNext](#) program and The Scattergood Foundation's [Building Evaluation Capacity Initiative \(BECI\)](#), which was developed and implemented in partnership with The Consultation Center at Yale.

² The co-investors are the Scattergood Foundation, United Way of Greater Philadelphia and Southern New Jersey, The Philadelphia Foundation, The Barra Foundation, The Nelson Foundation, The Horner Foundation, The Edna McConnell Clark Foundation, and Campbell Soup Foundation.

³ Visit <https://www.pewtrusts.org/en/projects/supporting-the-greater-philadelphia-area/health-and-human-services/evaluation-capacity-building-initiative>

⁴ Visit <https://www.scattergoodfoundation.org/do/risepartnership/> to learn more about the program components and organizations



EVALUATION ACTIVITIES AND METHODOLOGIES

Equal Measure took a developmental and emergent learning approach—weaving qualitative and quantitative findings with learning activities to inform the ongoing evaluation, guided by Learning Questions (see Appendix 2). Over the three years, we conducted interviews and surveys with both co-investors and participants to learn how the program had influenced and impacted organizational operations and outcomes. We evaluated each cohort independently, designing each approach to match the characteristics, schedules, and pace of each separate group.

For the Readiness Cohort, we conducted focus groups with each of the three Readiness Cohorts after each cohort had completed its RISE group trainings. A total of 25 Readiness Cohort organizations participated in the focus groups, in which the Readiness Cohort organizations reflected on their experiences and had space to connect. During the two years that we evaluated the Implementation Cohort, we conducted a comparative survey of all 15 organizations during year one and year two, in addition to participant interviews during year one and a focus group during year two.

The evaluation used RISE’s Theory of Change (TOC) (see Appendix 1) to map the program components along a continuum of impact at the following levels:

Table 2. RISE Theory of Change describes expected changes at four levels.

Theory of Change Level	Definition
Individual	Enhance the evaluation skills and competencies of leadership and staff in a specific program
Organizational	Foster a culture of evaluation and continuous learning that can be adopted in other programs
Systems	Create a community of funders that aligns priorities and local initiatives to build and sustain effectiveness; Create a regional learning community of organizations focused on evaluation and effectiveness
Regional⁵	Strengthen, empower, and connect organizations; Engage and influence funders to collaborate and better support grantees; Build an ecosystem that supports greater learning and impact; Increase the reach, quality, and impact of opportunity for children, youth, and families

In response to the COVID-19 pandemic, evaluation activities were shifted from in-person to a virtual environment. We consolidated qualitative activities from individual interviews to focus groups to reduce burden on participants and allow organizations to support and connect with each other within a shared setting.

Aligning the Equal Measure Evaluation with the RISE Partnership Consult Log

Throughout the evaluation, we mapped our findings to the Scattergood Foundation and The Consultation Center at Yale’s evaluation **Milestones** and **Capacities**, their measurement indicators for organizational growth. The indicators included: develop logic model, create or update data collection tools, invest in technology systems to support evaluation, find an “evaluation champion,” and more. (See Appendix 3 for more milestones and capacities).

⁵ For much of our analysis, we combined the Systems and Regional Levels, designated as “Systems/Regional,” since we did not conduct an evaluation of regional outcomes and indicators. We collected data on individual and organizational visions for systems and regional change and how the RISE Partnership influences progress.



We explored cohort-level organizational benchmarks using frameworks designed by the Scattergood Foundation and The Consultation Center at Yale. We aligned the specific Milestones and Capacities into our protocols and survey design for the participant organizations to identify elements of organizational capacity building. Progress on independent evaluation milestones can provide indications that an organization is developing along a growth trajectory toward greater capacity for measurement, learning, and sustainability.

Our cohort-level evaluation complemented RISE's own tracking at the organizational and program level. Overall, Equal Measure's cohort-level findings corroborated the RISE Partnership findings at the organizational level, reinforcing the validity of both bodies of work.



EVALUATION FINDINGS

Participant Level Findings

RISE organizations across all cohort levels highly valued the many and various opportunities provided by the RISE Partnership to strengthen their evaluation capacity. Participants from the organizations consistently reported valuing capacity-building activities, like individual consultations and group learning experiences. Participants reported that new and improved skills in creating logic models and identifying clearer outcomes improved their ability to plan, operate, and report on their programs. In the sections below, we discuss findings specific to the Readiness and Implementation cohorts.

READINESS COHORT FINDINGS

The following three themes represent the Readiness Cohort organizations' experiences as described during focus groups:

Readiness Cohort participants are beginning to nurture a culture of evaluation and continuous learning and are redesigning programs to be more impactful and more clearly advance organizational goals. Increased awareness of how activities are connected to outcomes compelled many participants to ask more pointed questions when assessing and designing organizational plans. As participants became more adept at asking questions, they also improved their capacity to collect useful data. For example, organizations embedded data considerations earlier in the planning process by identifying data sources and methods that connected activities and outcomes more directly (e.g., incorporating qualitative data; implementing surveys and focus groups).

"It's like having a workshop. You have all these tools that are laying around and you build things and make things work. But now it's like, all right, every tool has a place now. And it just clears up so much of your vision and so much of your space so that you actually have more space to do more work, and projects don't start overlapping, or you don't start getting mission drift." – Readiness Cohort Participant

Readiness Cohort participants valued the opportunity to develop stronger peer-to-peer networks within a regional learning community of organizations focused on evaluation; strong networks are an important precursor to creating a thriving nonprofit ecosystem. Readiness Cohort participants wished for more opportunities to partner with like organizations to learn together, share best practices, and design programmatic and funding strategies to achieve similar outcomes. A peer-to-peer network could help to form bonds and decrease the isolation organizations may have experienced because of the pandemic.



Many Readiness Cohort participants support collaborative efforts among philanthropic funders to work in greater alignment and share initiatives that could continue to build and sustain nonprofit evaluation capacity and effectiveness. Many of the participants encouraged funders to support organizational evaluation capacity activities beyond programmatic dollars, for example, supporting data capacity or operational funds. They envisioned having the internal capacity to conduct robust and comprehensive evaluations that would produce useful data and outcome reports. In the longer term, a funding sector that is aligned toward strengthening evaluation capacity and data use could have systemic impacts on the regional nonprofit ecosystem.

IMPLEMENTATION COHORT FINDINGS

We explored the impact of RISE on the Implementation Cohort through a comparative survey, enhanced with additional qualitative findings.

Overall, Implementation Cohort participants generally value evaluation capacity building that instills a learning culture in which feedback informs organizational decision-making both internally and externally. Some participants report that the culture of learning has influenced them to advance their organizational thinking and their commitment to using evaluation methods to improve programmatic development.

Emergent themes on Evaluation Milestones, Evaluation Capacities, RISE Benefits, RISE Challenges, and Ways Funders Can Support Evaluation Capacity follow:

Evaluation Milestones

We used the RISE Partnership milestones as a gauge for evaluating the Implementation Cohort (See Appendix 3).

The most common milestones the Implementation Cohort participants met were within the following evaluation activities: Evaluation Planning and Design, Data Collection, and Data Analysis; those least commonly met were within Data Use and Evaluation Sustainability. The milestone cohort members met most frequently was Drafting and Completing Logic Models, an activity that was the primary focus of their consultations with the RISE consultants in the first year of the program. The next most common milestones met were within Data Collection, as organizations developed stronger data collection tools and identified indicators that could more effectively measure outcomes. Organizations prioritized building capacity for more foundational planning, design, and collection, but had less time to analyze data rigorously, so Data Analysis lagged Data Collection. Many organizations encountered disruptions in either data collection or data analysis due to the COVID-19 pandemic.

Implementation Cohort participants achieved many additional milestones within Evaluation Planning and Design and Data Collection activities in the second year of training, demonstrating that two years of training for mature organizations may be valuable. During the second year, organizations grew in the areas of Data Use and Evaluation Sustainability as they became more comfortable using data for decision-making and reporting. As Table 3 depicts, these improved skills led to additional resources in evaluation personnel and capital. Some achievement metrics decreased slightly in the second year either because the milestones were met in the initial year, or the organization encountered additional disruptions in programming due to the COVID-19 pandemic.



Table 3. The percentage of Implementation Cohort participants who made progress increased from 2020 to 2021 in all evaluation capacity domains except in Data Analysis.

Evaluation Capacity Domain	Change from 2020 to 2021 in percentage of participants who indicated progress was made	Progress made by participant organizations
Evaluation Planning and Design	—	Developed logic model draft
	▲	Completed logic model
	—	Revised logic model
	—	Identified ways to use logic model in other program areas
Data Collection	—	Developed or revised existing data collection tools
	—	Drafted data collection plan
	▲	Completed data collection plan
	▲	Implemented new or revised data collection tools
Data Analysis	▼	Drafted analysis plan
	▼	Analyzed new data collection elements
	▼	Integrated analysis into new or existing data dashboards/reports
Data Use	▲	Use data to drive decision-making at the program level
	▲	Use data to drive decision-making at the leadership level
Evaluation Sustainability	▲	Added evaluation roles and responsibilities to specific job descriptions
	▲	Allotted additional resources in specific technology systems to support evaluation
	▲	Placed additional investment in dedicated evaluation roles/functions

We completed a project with RISE that was a game-changer for our organization in the way we visualize and analyze data. We have been working towards this for years, but RISE gave us the final push and guidance to make it happen. – Implementation Cohort Participant

Evaluation Capacities

RISE Partnership capacities served as another gauge for evaluating the Implementation Cohort (See Appendix 3).

Over two years, most Implementation Cohort organizations made significant progress in all capacities of Evaluation Knowledge, Evaluation Champion, and Support from Leadership. Organizations achieved enhanced capacity in Evaluation Resources in Year 1 compared to Year 2,



perhaps due to the enduring effects of the COVID-19 pandemic into Year 2. The following tables demonstrate the impact of the RISE Partnership on achieving all capacities.

Table 4. Most Implementation Cohort organizations made progress in capacities of Evaluation Knowledge, Evaluation Champion, and Support from Leadership over two years.

Evaluation Capacity	Organizational Changes	Percent of Organizations Experiencing Progress	
Evaluation Knowledge	Started experiencing changes in culture, mindset, or approach to evaluation	2020	86%
		2021	88%
Evaluation Resources	Began shifting new resources towards evaluation capacity (e.g., personnel, material, technological, and financial resources).	2020	82%
		2021	71%
Evaluation Champion	Found an “evaluation champion” who values and advocates for evaluation internally	2020	75%
		2021	88%
Support from Leadership	Leadership has committed to building an evaluation culture (e.g., allocating resources, supporting staff professional development, setting up infrastructure).	2020	72%
		2021	88%

The knowledge, skills, and abilities we’ve accumulated through RISE have helped shape our organizational culture going forward. We’ve developed better processes, higher standards, and a culture of planning and execution around Measurement and Evaluation that we can now sustain through future program cycles. – RISE Participant

RISE Benefits

Implementation Cohort respondents in 2020 and 2021 universally agreed that RISE’s vision was to provide access to expertise and resources on evaluation. Year 1 is focused on skill building, with a goal of embedding and integrating the new skills and knowledge into organizational practice in Year 2. As the following list illustrates, organizations benefited from direct program and staff development in 2020 and then evolved to think broadly about impact and organizational purpose in 2021. The respondents described that participating in RISE has supported them to move from skill-building in 2020 toward sustaining in 2021. RISE has helped them to:

2020:

- Move evaluation from “theoretical” to “practical” for their organization
- Increase data capacity to inform program improvement
- Improve more staff members’ skills and knowledge in evaluation
- Keep the organization focused on evaluation

2021:

- Build, strengthen, and maintain evaluation efforts and infrastructure
- Increase capacity to effectively tell their story using data
- Expand thinking and mindset about their work “beyond our daily keeping the lights on”



RISE Challenges

Time and capacity constraints remained the most challenging factor for Implementation Cohort participants, creating barriers to attend training sessions and complete between-session assignments. Even with the availability of the virtual environment during the COVID-19 pandemic, Implementation Cohort participants felt challenged by expectations to commit to the trainings and consultations. In a focus group, Implementation Cohort participants suggested ways to use time for networking and relationship-building instead of more structured training and skill-building. For example, participants recommended breaking up organizations by sub-groups such as sector, to connect more informally and share knowledge, services, and impact on communities.

The cohort experience was not fully realized due to the impact of the pandemic and the consequent shift from in-person to virtual learning. The pandemic hampered community-building opportunities for participants that may have decreased feelings of isolation.

Ways Funders Can Support Evaluation Capacity

Implementation Cohort participants identified ways in which funders can help improve the effectiveness of the nonprofit ecosystem:

- Develop more realistic expectations when making asks to nonprofits;
- Better understand and help tackle systemic challenges that nonprofits face (e.g., access to data); and
- Coordinate and sync reporting requirements with other funders.

Overall, Implementation Cohort participants expressed a strong desire to see funders modify and streamline grantee expectations and improve systems for strengthening organizational capacity and effectiveness.

*"Having more **uniformity across foundations' desired outcomes** would not only allow organizations to better report on outcomes, but (also) help organizations focus on **moving the needle on those outcomes** as opposed to scrambling to report to the wide array of outcomes across all funders." – Implementation Cohort Participant*

Effects of COVID-19 Pandemic on Implementation Cohort Participation

The 2020 Implementation Cohort survey shows that though the organizations' program operations were heavily impacted by the COVID-19 pandemic (e.g., a move to virtual operation, staff reduction), the pandemic had minimal impact on the organizations' ability to participate in the RISE trainings and work on strengthening internal evaluation capacity. On the other hand, most Implementation Cohort participants could not carry out their planned evaluation activities such as conducting surveys and testing evaluation systems because of the programmatic disruptions caused by the pandemic.

In late 2021, two years into the pandemic, Implementation Cohort participants had more mixed reflections on how the pandemic impacted their experience in RISE. Some participants found it



challenging to maintain focus on evaluation training in the face of immediate needs, while some found time and space during the pandemic to step back and work on data. Participants appreciated the convenience and efficiency of virtual sessions; however, many felt that they may have missed networking opportunities with peer organizations. In addition, they described how trust-building between funder and grantee could have been deepened during the initial three-year RISE experience through more frequent convening opportunities—the pandemic impacted these opportunities as well.

SUSTAINABILITY COHORT FINDINGS

Once the COVID-19 pandemic began affecting organizations in March 2020, we shifted our plans for conducting the Sustainability Cohort evaluation and focused on evaluating the Readiness and Implementation Cohorts, to identify support needs and continue the learning. Evaluating broader impacts on the nonprofit sector was not feasible since all nonprofits had to substantially shift their operations. After some initial interviews with Sustainability Cohort organizations, we found participants felt better equipped and more confident to have dialogues with funders about their work and impact but were concerned by the lack of funding for evaluation needed to meet the funding requirements.

Co-Investor Findings

The RISE Partnership Theory of Change aims to effect change in two parts of the regional nonprofit ecosystem: foundations and nonprofit organizations. It recognizes the need for change in both types of organization to build an ecosystem that supports greater learning across organizations and greater impact on communities served. RISE engaged funders to collaborate and better support grantees, as well as to strengthen, empower, and connect nonprofit organizations through evaluation capacity. To support these goals, Equal Measure’s co-investor engagement was structured with two components:

- 1) Share and discuss emerging findings about the impact of RISE on grantee organizations; and
- 2) Better understand the co-investor model.

This section explores these two components, guided by the following learning questions:

- What does co-investor engagement bring to the nonprofit ecosystem?
- How can co-investor engagement influence the nonprofit ecosystem?
- How does this engagement influence co-investors—independently and regionally?
- To what extent has funder capacity and process changed to meet participant needs?

Note on co-investor engagement

In response to the Covid-19 pandemic and the racial justice movement of 2020, Equal Measure modified some of the planned approaches to co-investor engagement. All but the first reflection session (November 2019) was conducted virtually and the reflection session in June 2020 included a focus on racial justice and racial equity. In sum, Equal Measure conducted one round of individual interviews, five reflection sessions, and a survey with co-investors.



The collective funding model of the RISE Partnership created a financially low-risk opportunity for regional and national foundations to come together to fund a capacity building initiative.

Foundations recognized the potential in RISE to stretch the impact of their funds by combining with other foundation dollars. The shared risk of the pooled funding model also helped to get buy-in from their boards. Co-investors valued the entrepreneurial approach of RISE to bring multiple funders together and hoped that their joint support for a single initiative would open more capacity building opportunities for nonprofits and reduce competition among nonprofits and funders alike.

The co-investment model provided foundations a valuable opportunity to combine their funds, yet opportunities for uniting them in a shared systems-change effort remain. For almost all co-investors, building relationships with other funders through the collective initiative and learning about the impact of strengthened evaluation capacity on grantee organizations were valuable parts of investing in RISE. Very few, however, reported building relationships with grantees, reflecting on their foundations' internal practices, and learning more about the strengths and gaps in the region's nonprofit ecosystem as valuable parts of investing in RISE.

Though individual co-investors were strongly aligned in their support for evaluation capacity and recognized the potential for RISE to have a systems-level impact, as a collective they did not formally establish and articulate a shared vision, goals, or commitment. They also did not determine which system to focus on collectively. The Covid-19 pandemic that started soon after the initial gathering of co-investors may have disrupted this important process of establishing common ground.

"[B]ringing a collaborative effort together with funders in the region was very powerful. I believe the example will foster more collaborative work between funders in the future." – Co-Investor

Preparing individual co-investors to be organizational change agents for their foundations requires targeted effort and support. Most co-investors reported RISE did not have significant impact on their foundations regarding the systems-level challenges that RISE participants elevated.

"Investor engagement in systemic or acute problems in our city would be the way I would like to see co-investors focus their work." – Co-Investor

Challenges elevated by participants included aspects of foundations' internal practices like grantee selection and reporting requirements; participants also elevated potential responses to issues across the nonprofit ecosystem, like aligning reporting requirements across funders and tackling systemic challenge in the community together. Participants felt that having a greater shared understanding with foundations of the existing power differentials and inequities in the regional nonprofit ecosystem would lead to better solutions.

Individual co-investors reported challenges in getting buy-in and commitment from their boards and felt limited in their ability to influence their organization and the broader funder community. Co-investors suggested that specific guidance on tactics to encourage other funders to think at a systems-level and practical tools for issues like better measuring impact more responsive to grantees, could have helped them become more effective organizational change agents for the funder community.

"We forget how hard those initial steps were, and I believe [RISE] will foster more collaborative work between funders in the future. I felt a bit too much like a passive participant in the process and wish I had challenged myself to present/teach others what we were learning to spread awareness." – Co-Investor



CONSIDERATIONS

The following considerations emerge from participant and co-investor Data Collection and Findings. They highlight broader lessons from the RISE Partnership that could influence the achievement of greater impact on outcomes in the nonprofit ecosystem. Our evaluation and findings focused on impact at the Individual and Organizational Levels of the RISE Theory of Change; we hope these considerations may influence further thinking on Systems and Regional Levels that could be pursued in future RISE Partnership iterations.

Maximize benefits to RISE participants, including current participants, program graduates, and future participants, by improving RISE programming. For example:

- Maximize participants' time on individual consultations and peer learning, using hybrid virtual and in-person meeting best practices.
- Convene participants beyond the RISE programming training schedule to foster peer relationship-building and information exchange.
- Form alumni networks to continue sharing knowledge and networking around evaluation.

Advocate—to internal board and external foundation colleagues—for capacity building and other investments in nonprofit organizations to foster continuous learning. For example:

- Partner with other foundations working with the same grantees to streamline administration and grantmaking requirements, creating common measures and timelines and lessening the burden on grantees to perform redundant reporting.
- Fund evaluation capacity activities as part of the grant structure so that nonprofits are better equipped to meet funder evaluation expectations.

Use systems thinking to combat inequities in the regional nonprofit ecosystem through better alignment of funder expectations and requirements. For example:

- Collaborate and coordinate with other funders to focus on root causes of, and solutions for, systemic inequities that nonprofit organizations work against.



- Create conditions for nonprofit organizations to use evaluation as a learning tool rather than a compliance tool. For example, enable nonprofit organizations, rather than funders, to set the outcomes they want to measure.
- Cultivate collaboration among nonprofit organizations rather than competition. Identify shared goals and outcomes that resonate with other funders and grantees to “move the needle” together on systemic challenges.

Build bridges between funders and nonprofits to facilitate understanding and ownership among different stakeholders in the regional nonprofit ecosystem. For example:

- Broker deeper two-way communication and stronger alignment and trust between funding organizations and nonprofit organizations.
- Consider ways to shift power from funders to nonprofits by including diverse stakeholders in decision-making on grant reporting requirements, measurements of success, and priority funding areas in communities of service.

We believe this evaluation points to concrete ways that a strong collaborative relationship between funders and nonprofits, with a focus on learning and growth, has the potential to strengthen region’s nonprofit ecosystem—change that can directly impact the lives of individuals living in the communities that are served by these organizations. We hope future funders of models such as RISE can learn from this experience to do the hard, long-term work required to accomplish the important change demanded by these times.

ABOUT EQUAL MEASURE

Equal Measure is a Philadelphia-based nonprofit consultancy working with national and regional foundations, nonprofits, and public entities to advance social change. Equal Measure offers program design, evaluation through a wide range of methodologies, capacity building, technical assistance, and communications services to help those who do good do even better. For more than 30 years we’ve partnered with clients across the broad spectrum of content areas, sharing fresh insights and translating good ideas into meaningful change—strengthening our clients’ efforts to make our communities healthier, more equitable, and more inclusive.

For more information about Equal Measure, please contact Eve Weiss, Senior Director, at eweiss@equalmeasure.org or visit equalmeasure.org.

ACKNOWLEDGEMENTS

We want to thank the leaders and supporters of the RISE Partnership including the Scattergood Foundation, The Consultation Center at Yale, and the RISE Partnership Co-Investors for their participation in our evaluation and the guidance they provide to their own communities and others. The RISE Partnership Co-Investors include the [Edna McConnell Clark Foundation](#), [The Scattergood Foundation](#), the [United Way of Greater Philadelphia and Southern New Jersey](#), [Campbell Soup Foundation](#), [The Horner Foundation](#), the [Barra Foundation](#), [The Philadelphia Foundation](#), and [The Grace S. and W. Linton Nelson Foundation](#).



APPENDIX 1: THEORY OF CHANGE

RISE PARTNERSHIP THEORY OF CHANGE

Working Model: Fall 2019

By focusing on the development of program-, organization-, and system-level evaluation capacity, we seek to cultivate organizational cultures of evaluation and build regional infrastructure supporting evaluation and **ultimately influence greater effectiveness at multiple levels in our region.**



PROGRAM MODEL

We translate our core values into practices that support organizations at varying stages of evaluation capacity building.

Readiness

Organizations will develop foundational evaluation skills and competencies for continuous learning

Implementation
Organizations will develop evaluation capabilities and create organizational cultures of evaluation and continuous learning

Sustainability
Organizations will sustain and expand organizational cultures of evaluation through evaluation partnerships and learning in the regional ecosystem

We incorporate a variety of approaches to support organizations:

- Individual consultation
- Group training and networking opportunities
- Learning resources: online platform, monthly newsletter
- Funder convenings
- Annual learning conference



APPENDIX 2: LEARNING QUESTIONS AND METHODS

Stakeholder	Learning Questions	Qualitative Approaches and Timeframe	Quantitative Approaches and Timeframe
Co-Investor	<ul style="list-style-type: none"> • What does co-investor engagement bring to the nonprofit ecosystem? • How can co-investor engagement influence the nonprofit ecosystem? • How does this engagement influence co-investors – independently and regionally? • To what extent has funder capacity and process changed to meet participant needs? 	<ul style="list-style-type: none"> • Individual Interviews (Fall 2019) (N=9⁶) • Reflection Sessions (Fall 2019, Summer 2020, Winter 2021, Fall 2021, Spring 2022) 	Survey (Winter 2022)
Readiness Cohort	<ul style="list-style-type: none"> • How have knowledge and skill building changed for participant organizations around key concepts, tools, and resources for internal evaluation capacity building and performance management? • Have organizations improved their capacity to collect, use, and apply data for ongoing improvement and learning? • How does the cohort learning approach benefit nonprofits? • To what extent has the RISE Partnership improved conditions for increased regional capacity? • Is the cohort model scalable? 	1 Focus Group per Cohort (x3) (Summer 2020 (N=10), Spring 2021 (N=8), Fall 2021 (N=7))	N/A
Implementation Cohort		<ul style="list-style-type: none"> • Individual Interviews (Spring 2020 (N=7)) • Focus Group (Fall 2021) (N=3) 	Comparative Surveys (Fall 2020, Fall 2021 100%, 93% response rates)
Sustainability Cohort		Individual Interviews (Summer 2020 (N=5))	N/A

⁶ We interviewed consultants from the Yale Consultation Center in addition to the 8 co-investors.



APPENDIX 3: SCATTERGOOD/YALE MILESTONES & CAPACITIES

RISE Partnership Evaluation Milestones

Evaluation Activity	Milestone
Evaluation Planning and Design	Draft Logic Model Developed
	Completed Logic Model for Use
	Revision/Iteration of Logic Model
Data Collection	Draft Data Collection Plan Development
	Development of New or Revision of Existing Data Collection Tools
	Completed Data Collection Plans
	Implementation of New/Revised Data Collection Tools
Data Analysis	Draft Data Analysis Plan Developed
	Analysis of New Data Collection Elements
	Integration of Analysis into New or Existing Data Dashboards
Data Use (Driving Decision Making at...)	Program Level
	Leadership Level
	Board Level
Evaluation Sustainability	Formal Specification of Evaluation Roles and Responsibilities Added to Specific Job Descriptions
	Additional Investment of Resources in Specific Technology Systems to Support Evaluation
	Additional Investment of Resources in Dedicated Evaluation Roles/Functions

RISE Partnership Evaluation Capacities

Capacity	Organizational Changes
Evaluation Knowledge	Started experiencing changes in culture, mindset, or approach to evaluation
Evaluation Resources	Began shifting new resources towards evaluation capacity (e.g., personnel, material, technological, and financial resources).
Organizational Stability	Experienced higher organizational stability (e.g., low staff turnover, financial stability, established leadership)
Evaluation Champion	Found an "evaluation champion" who values and advocates for evaluation internally
Support from Leadership	Leadership has committed to building an evaluation culture (e.g., allocating resources, supporting staff professional development, setting up infrastructure).