Needs Assessment – PROSPECTS: What We Heard

Summary Report

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INTRODUCTION: WHAT IS PROSPECTS?

Propelling to Result-Oriented Strategies in Planning, Evaluation, and Continuous Transformation in Settlement (PROSPECTS) is an initiative funded by Immigration, Refugees, Citizenship Canada (IRCC), aimed at enhancing the capacity of organizations within the settlement sector in evaluation and research.[1] This project aims to design and deliver a series of evaluation capacity building and organizational transformation activities based on two guiding principles:

1. Meeting organizations where they are at (in terms of outcome-based approaches through the use of evaluation)
2. Active development through generative listening and learning by doing.

In line with these guiding principles, the project began with a needs assessment of the evaluation capacity of organizations in the settlement sector.

PURPOSE OF THE NEEDS ASSESSMENT PHASE

As an initial step in the project, we conducted a needs assessment of evaluation capacity within the settlement sector through an online survey and consultation sessions with organizations across Canada. Both the consultation sessions and the survey introduced participating organizations to PROSPECTS and gave them space to reflect on their organization's evaluation knowledge, skills, and needs. This phase helped organizations think about their current practices, identify strengths and gaps, and explore how evaluation can improve programs and demonstrate impact. It also provided SRDC with insight into how organizations are using evaluation, identify gaps and capacity building priorities, and create practical ideas for how PROSPECTS can support their work.

WHAT DID WE DO?

Between June and October 2025, the PROSPECTS team held seven virtual consultation sessions (four in English and three in French) and five in-person sessions in Vancouver (English), Ottawa (bilingual), Toronto (English), and Saskatoon (one in French and one in English) with a total of 113 participants. At each session, we introduced participants to PROSPECTS, asked them about

[1] This project is funded by Immigration, Refugees and Citizenship Canada. The contents of this report are solely the responsibility of the authors.

their understanding and use of evaluation, and explained how we define evaluation and discussed its potential applications. Finally, we led group activities to assess organizations' level of confidence and experience with evaluation, the challenges they face, their needs, and which capacity-building activities would be most useful to them. During the consultation sessions at the 8th Metropolis Identities Conference in Saskatoon, participants reviewed preliminary findings from earlier consultations and had the opportunity to provide additional input.

From July to November 2025, we also conducted a bilingual survey that asked questions on topics similar to those addressed in the consultations including about understanding evaluation, confidence in performing evaluation activities, barriers and facilitators, organizational needs, and preferred capacity-building formats. 55 individuals responded to the survey. Most of these survey respondents worked in service provider organizations, held management roles, served immigrants directly, and were based in cities or large towns.

At least 86 unique organizations participated in the needs assessment activities from across ten provinces and territories: Ontario (29), British Columbia (20), Alberta (13), Nova Scotia, Manitoba, Prince Edward Island, Saskatchewan, New Brunswick, Quebec, and the Northwest Territories.

WHAT DID WE HEAR FROM ORGANIZATIONS?

WHAT EVALUATION MEANS TO PARTICIPANTS

Through both the consultations and the survey, we explored what evaluation means to organizations. During the consultations, participants were invited to reflect on their own definition of evaluation and identify the key elements or processes that came to mind. When asked about their feelings about evaluation, participants used words such as stress, dread, failure, anxiety, pressure, worry, and judgment.

> Everybody cringes when you bring up monitoring and evaluation. [When you leave it for the end] everybody's cringing because they're concerned about failure."
>
> (Participant in online consultation session)

The word cloud below (figure 1) illustrates the words consultation participants most often used to describe what evaluation means to them. It reflects input from both English and French sessions, with French words translated into English.

Figure 1 Words used by consultation participants in describing what evaluation means



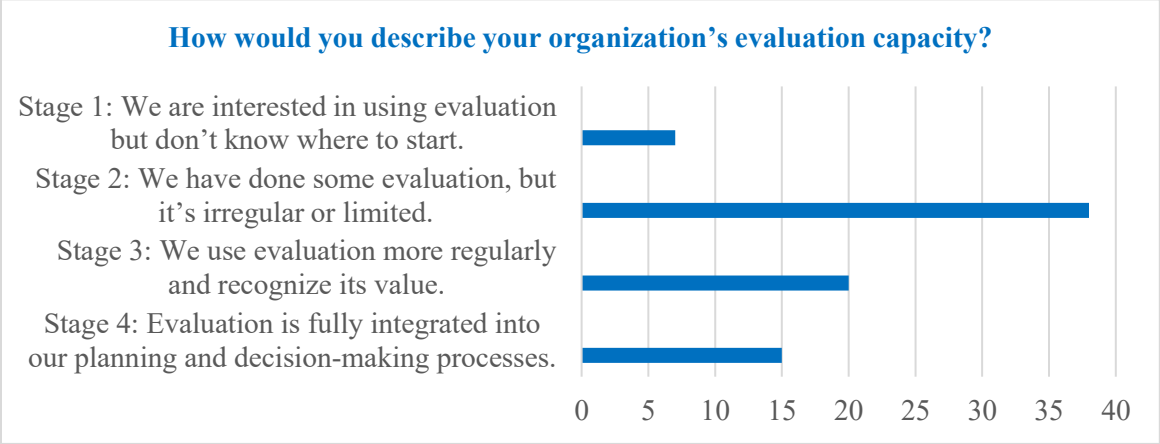
In the survey, respondents were presented with four possible definitions of evaluation and asked to select the one that best reflected their perspective. Most respondents chose definitions describing evaluation as a funder-driven reporting requirement, a tool for learning and improvement, or a form of performance measurement. Fewer respondents selected the definition framing evaluation as a systematic, neutral process of data collection and analysis to assess whether, how, and for whom programs or services are working, which is the definition that underpins this project.

HOW ORGANIZATIONS DESCRIBED THEIR EVALUATION CAPACITY

In both the consultations and the survey, participants were asked to describe their organization's evaluation capacity using four defined stages.[2] Most consultation participants reported being at Stage 2 ("We have done evaluation, but it's irregular or limited") with 38 respondents in this category. This was followed by Stage 3 with 20 participants ("We use evaluation more regularly and recognize its value"), and Stage 4, with 15 organizations ("Evaluation is fully integrated into our planning and decision-making processes"). The smallest group was at Stage 1, described as "We are interested in using evaluation but don't know where to start."

[2] These stages were developed based on a study of a literature, but there are many ways that evaluation capacity can be classified.

Figure 2 Consultation participants' by evaluation capacity stage

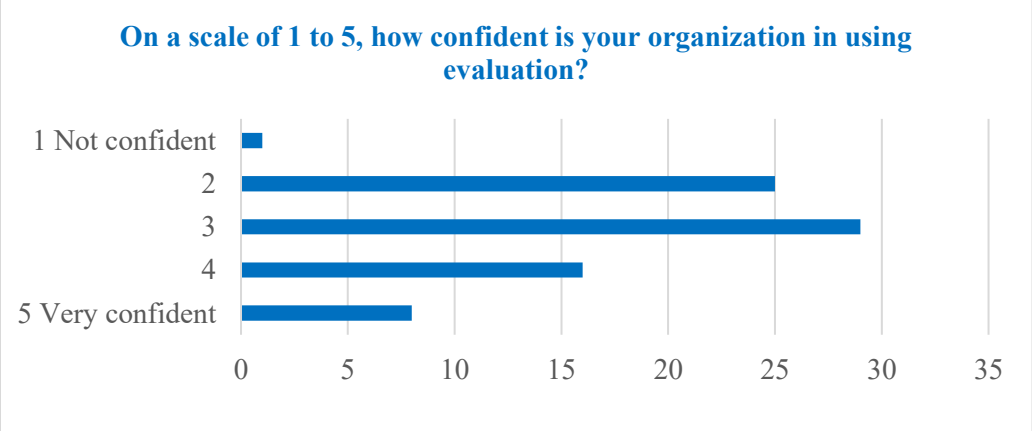


Among survey respondents, the largest share also identified their organization's capacity as Stage 2. However, unlike the consultations, the proportions for Stages 3 and 4 were only slightly lower.

WHERE ORGANIZATIONS STAND ON THEIR CONFIDENCE IN USING EVALUATION

In both the consultations and the survey, we asked participants to assess their organization's confidence in using evaluation. In the consultations participants rated their organization's confidence on a scale of 1 (not confident) to 5 (very confident). Most responses clustered around the middle: 29 participants chose 3 and 25 chose 2, with fewer reporting higher confidence.

Figure 3 Consultation Participants' Confidence in Using Evaluation



In the survey, we explored organizations' confidence in carrying out specific evaluation activities. Most indicated that their organization was very confident in identifying outcomes to measure. However, a comparatively smaller percentage felt confident that people in their organization could analyze data.

HOW ARE ORGANIZATIONS USING EVALUATION?

In both the consultations and the survey, we asked participants about their organization's main reasons for conducting evaluations. In the consultations, the main motivation was to **improve programs**, by learning about what is working and what is not. In the survey, **funder requirements** emerged as the primary reason organizations conduct evaluation. Funder requirements were also acknowledged in the consultations as one motivator for data collection, but organizations stressed that funders tend to only ask for numbers and metrics that do not tell the whole story of a program. Another motivation mentioned was **sharing stories of the positive impact** of the program.

> "Funders were interested in the numbers … the stories and the systemic change that was happening were not captured."
> (Participant in online consultation session)

The main evaluation activities undertaken by organizations were:

- **Performance measurement** – performance measurement was more commonly used than evaluation.[3]
- **Surveys** – in the consultations we heard that post-activity satisfaction surveys were the most common, others using more in-depth surveys periodically. Some have developed multilingual surveys to improve reach.
- **Discussion groups and interviews** – these allowed organizations to explore qualitative storytelling, share success stories, engage stakeholders, and improve programs.
- **Evaluation framework** – some organizations have or were in the process of developing an evaluation framework. In addition, about half of survey respondents reported that their organizations define evaluation questions, identify outcome indicators, and develop evaluation plans for programs or the organization as part of their evaluation process.

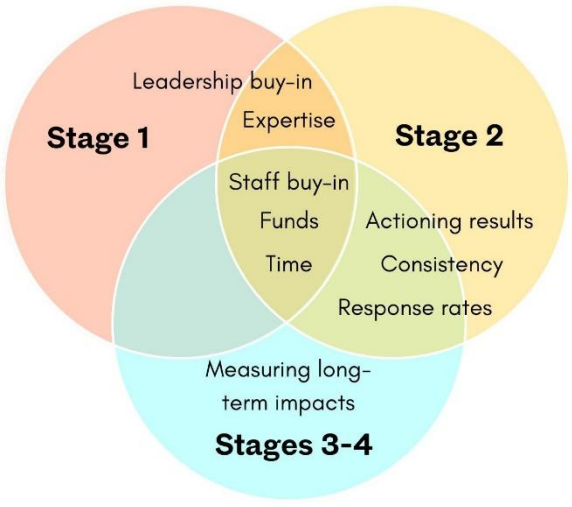
[3] Performance measurement and evaluation are on the same continuum but serve different purposes. Performance measurement is ongoing, uses performance indicators to assess performance and is useful for identifying when there is a problem, but does not explain why and how a program or policy works well or what results can be attributed to the program itself (https://www.canada.ca/en/treasury-board-secretariat/services/audit-evaluation/evaluation-government-canada/policy-results-what-evaluation.html)

- **External evaluator** – organizations hired external evaluators for a range of purposes: to develop a pilot project, to see how a specific program could be improved, or to develop templates and a framework for the organization. However, only a small number of survey respondents reported that their organizations conduct evaluations with external support.
- **Internal evaluator position** – Only a few consultation participants and survey respondents reported their organization had a dedicated full-time or part-time staff person dedicated to evaluation, but those that did highlighted how this helps bring consistency and coherence.
- **Observations** – Some organizations use site observations as a learning opportunity.
- **Impacts on diverse groups:** About half of survey respondents reported that their organizations regularly examine the impact of programs on diverse groups.

WHAT CHALLENGES ARE ORGANIZATIONS FACING IN CONDUCTING EVALUATIONS?

Consultation participants were asked to share some barriers their organizations were facing in their evaluation journey. The most commonly mentioned barriers (Figure 4) were lack of time to conduct evaluations, staff buy-in, resources and training, knowledge around evaluation, and funding which aligns with what was reported by survey respondents. Organizations with less experience (Stage 1) in particular expressed uncertainty over how to obtain funding for evaluation.

Figure 4 Evaluation barriers across stages



We expand on other more nuanced challenges below:

- **Engaging participants:** Response rates and engagement were a key challenge for conducting evaluations**.** Organizations highlighted technological or language barriers among clients, or a general "survey fatigue" because they interact with multiple programs.

- **Consistency:** Ensuring consistency across the organization was a major challenge for those in stages 2 and 3. Each evaluation they had to "start from scratch" because of the lack of standards or guidelines. This was exacerbated by high staff turnover and the restriction of evaluation funding to specific programs. Some organizations also mentioned difficulties developing rigorous evaluation frameworks that help measure progress while remaining flexible enough to adapt to program changes based on shifting demands and priorities.

- **Actioning results:** Several organizations in stages 2 and 3 mentioned difficulties in sharing their evaluation findings effectively and integrating the results into organizational strategy and program change. Fewer than half of survey respondents said their organizations present findings in reports or presentations, develop recommendations based on evaluation results, use findings to improve programs/services, for business development or proposals, or share findings with funders or stakeholders.

> "So many resources focus on the collection of data, less so on what to do once you have it. … How do you make it meaningful?"
>
> (Participant in online consultation session)

- **Measuring long-term impacts:** Because program funding tends to be on a short cycle (currently three years for many IRCC-funded programs), establishing a system to evaluate long-term impacts was identified as a challenge by those in stages 3 and 4. This lack of long-term perspective also made it difficult to assign credit (which programs created this effect).

- **Indirect service model:** Umbrella organizations, LIPs and RIFs felt that most evaluation tools and guides are designed for direct service providers and were unsure how best to conduct evaluations for an indirect service model.

UNDERSTANDING ORGANIZATIONS' EVALUATION CAPACITY NEEDS

In both the consultations and the survey, we asked organizations about their needs for building evaluation capacity and the types of supports they would find most useful. Both consultation participants and survey respondents rated the usefulness of several proposed supports, such as webinars, one-on-one coaching, group coaching, peer learning, and tools and templates. Consultation participants also shared ideas for what each activity could look like, including topics of interest and considerations for successful participation.

Overall, all proposed activities were seen as valuable. On average, the highest priority supports identified in the consultations were:

- webinars (both asynchronous and synchronous),
- one-on-one coaching (both lighter touch and in-depth), and,
- tools and templates to evaluate programs.

However, survey respondents expressed slightly different preferences, favouring short videos, step-by-step guides, and reference tools.

Within these high need supports, insights from the consultations and survey centred around the following:

- **Need for tools** such as new software, simple entry-point software options for staff with low expertise, data collection options beyond surveys, and frameworks.
- **Training topics** mentioned included the importance of evaluation, data collection, data management, analysis, knowledge mobilization, trauma-informed practices, GBA Plus, and using evaluation to inform decision-making

One of the top topics of interest chosen by survey respondents was **"communicating findings effectively",** a subject also brought up in consultations. In response, PROSPECTS recorded a webinar on tips and strategies for sharing results which can be accessed here: https://youtu.be/FYreqfK9ClQ

- **Need to prioritize scope of evaluation**: Guidance on where to focus in a context of constrained resources so that the evaluation scope aligns with resource capacity, funder demands, and internal goals
- **Need to engage external evaluators** to provide support and expertise to complement internal capacity, several organizations citing a lack of resources to do so

The last three bullets were described as particularly important for organizations just starting their evaluation journey – for example, a one-time professional evaluation can have long-lasting impact, as staff can gain expertise, tools and best practices they can apply in future for other programs.

> "[SRDC's webinar] was great because it was a deep dive into a very specific area, a lot of times when you attend those training sessions, they are so high level and so general that they are not helpful"
>
> (Participant in online consultation session)

NEXT STEPS

The consultations have brought valuable insight on how organizations in the settlement sector are using evaluation and what they need to strengthen their capacity. Based on these findings, the PROSPECTS team will focus on the following actions:

- Plan a series of **synchronous webinars** on topics that emerged from the consultations
- **Develop a repository of tools and templates** to help organizations establish consistency and improve efficiency in their evaluations
- Work with organizations who have reached out for **one-on-one coaching support**
- **Propose group coaching options** (topic, organization type) and organize based on interest
- Develop a website to **centralize information and resources** and propose optional learning paths for organizations based on their current level of evaluation use and expertise
- Create opportunities for organizations to **learn from their peers** about what has helped them in their evaluation journey
- Organize an advisory committee

Stay updated on upcoming webinars and resources by joining the PROSPECTS LinkedIn group: https://www.linkedin.com/groups/16091158/

To receive email updates about PROSPECTS activities, including upcoming webinars, please subscribe to our newsletter at: https://www.srdc.org/prospects/#prospectsnewsletter

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