GRANTMAKERS FOR EFFECTIVE ORGANIZATIONS

What Matters and What Works

Building Community Capacity for Evaluation and Participation

This document represents a first attempt by GEO's Place-Based Evaluation Community of Practice to codify *what matters and what works* in effective evaluation of place-based grantmaking work. This community, comprising private grantmakers and federal funding agencies, has been meeting over the course of eight months to share experiences and build individual and community knowledge.

As is so often the case, we found that the basic principles and recommended practices that emerged from our conversations weren't earthshattering. In fact, they were quite familiar – as solid principles for any responsible and effective community intervention. But they are often not put into use.

We're bringing these ideas to the GEO community in a half-baked form so that we can benefit from the experiences and ideas of others outside the Place-Based Evaluation Community of Practice.

**It's important to note that *community* may not be the same thing as the *community organizations* that receive funding. Some community organizations are extremely effective at engaging community members in meaningful ways. Others might have strong capacity around evaluation. But some will represent only a portion of the community or need additional support to engage residents in evaluation. In the thoughts that follow, we assume that funders conducting evaluations are connecting with community residents, whether through the community organizations or by some other means.

1. The evaluation must have value to the community

Evaluation can feel both intimidating and unnecessary to communities. It's critical for grantmakers to articulate the value that data and evaluation can provide for the community – and include questions of most interest to the community in its design.

WHAT WORKS:

- Identify and engage community stakeholders— and find out what they want to know.

- Create opportunities for community to get excited about the potential for evaluation to answer their questions.
- Include qualitative as well as quantitative methods
- Make sure that you share and discuss the intended use of the data that you collect.
- Make sure data makes it back to the community in a useable and useful format and timeframe.

FOR EXAMPLE:
The *Making Connections* (AECF) site in Denver brought small groups of community stakeholders together to identify the questions that they wanted to answer and the data to collect. Even though these questions weren't central to the funder's evaluation agenda, this process (and the information it yielded) engaged community members and helped them to understand the power and potential of evaluation.

2. The evaluation needs to make sense to the community

Evaluations of place-based initiatives are complicated, and it's important that community members have the training and information to understand the many moving parts and to interpret the findings of the evaluation.
WHAT WORKS:

- Designated community evaluation liaisons to keep track of and communicate the evaluation's moving parts.
- Right-in-time training and capacity building for key stakeholders: training that uses solid adult-learning principles and is offered repeatedly (to account for turnover) and at times that are convenient for working residents.
- Feedback loop and response – a process of finding out what types of questions residents have about the evaluation and addressing them as they arise.

FOR EXAMPLE:
The California Endowment's *Building Healthy Communities* (BHC) plan includes supporting a local learning/evaluation contact (team or individual) in each of the 14 sites. These liaisons work with the community collaboratives to develop local learning plans, identify meaningful ways to engage collaborative members to collect data relevant to the local BHC work. These local learning and evaluation staff also work with the foundation's learning and evaluation managers to facilitate cross-site learning.

3. Evaluation should illuminate, not intimidate

Often, evaluation is shrouded in a thick fog of jargon and technical vocabulary. It's seen as something that you need special credentials to understand. There are specific practices that can help demystify evaluation for community members and create opportunities for meaningful engagement.

WHAT WORKS:

- Make sure you have the right evaluators. First and foremost, they must share the values of community engagement and participation. They also need to be the right messenger with a high degree of cultural competence. In cases where this isn't possible, the funder needs to use "translators" to bridge the gap between evaluator and community.
- Structure trainings and other interactions for maximum understanding and to minimize intimidation. Prepare residents to get most out of evaluation meetings and be intentional about vocabulary and language.
- Honor the amount of time and effort that goes into learning.

FOR EXAMPLE:
The Annie E. Casey Foundation's *Making Connections* initiative used a pre-meeting breakfast to prepare residents for the evaluation meeting. During these breakfasts, residents were able to review materials, be introduced to terminology that might be unfamiliar to them, and ask preliminary questions. Community members were able to receive credit hours from a local community college for their participation in evaluation sessions.

4. **The community has history with evaluation – and we need to address it**

Many communities have seen evaluations come and go, often without any sort of closure or learning. This can create an understandable skepticism – or worse – about the value of evaluation work. Funders should tackle this head-on by understanding and addressing the community's history with evaluation.

WHAT WORKS:

- Know the community's questions/ concerns about previous research work .
- Pull together the evaluators working in the system, so that you know about all the data collection going on.
- Help to resolve evaluations in which data never made it back to the community. Even if the data can't be released back to the community, you can close the loop by reporting back to community members the status of the work.

5. One size doesn't fit all

Different communities are at different places in terms of their capacity for evaluation and their ability to engage residents in meaningful ways. So the support and technical assistance provided must be appropriate to their current capacity and needs.

WHAT WORKS

- Assess the readiness of the community and its areas of strength and weakness. Tailor TA depending on need.
- Be realistic about dosage and delivery – training will need to be offered multiple times in multiple ways.
- Make sure that training is effective. Assess it to be sure that the training intervention leads to intended results.

FOR EXAMPLE:

In the planning phase, The California Endowment developed a capacity assessment to gain a better understanding of core capacities needed to implement local plans. Now, TCE is working with the 14 sites to develop some core shared measures for cross-site learning around collaborative capacity, and later, programmatic indicators. Also, TCE will soon release an evaluation for learning curriculum that will be used with communities.

The Kansas Health Foundation uses a model of "Coaching on demand" to provide highly tailored technical assistance to community organizations taking part in its programs.

6. Funders need to approach our evaluation work with transparency, accountability, and consistency

With all the talk of indicators, accountability, and data that go along with evaluations, it's no surprise that communities begin to ask: "what are *your* indicators?" Funders must model transparency and self-evaluation if they are to be credible.

WHAT WORKS:

- Trust needs to be earned. Put the cat on the table: acknowledge the power differential.
- Be clear about the ultimate purpose of the evaluation (within funder and with community). Identify and communicate your intention and indicators of success. Don't switch from a "learning" orientation to a "results" orientation mid-stream.
- The evaluation's purpose will influence how resources are deployed. Understand that community engagement and participation takes time and resources. Make sure that your organization has realistic expectations for the how long it will take and how much it will actually cost to do this well.
- Recognize that evaluation may have risks and unintended consequences. Evaluation isn't just an intellectual exercise to communities: there are real people behind every number. A large-scale evaluation can have consequences that weren't intended, especially if it is used to justify cutting, rather than modifying, funding.

FOR EXAMPLE:

The Skillman Foundation included an independent assessment of their own progress as a results-oriented learning organization in their implementation evaluation.