

Evaluation in Philanthropy

Five Approaches to Effective Learning

June 6, 2011

Today's Presenters



J McCray

Grantmakers for Effective
Organizations

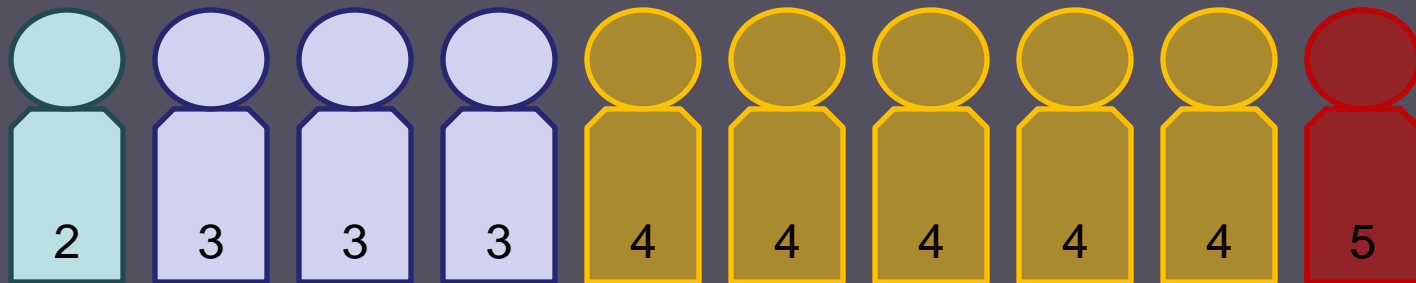
Today's Presenters



Leonor Alfonso
Grantmakers for Effective
Organizations

We asked you...

On a scale of 1 to 5 how would you rate your familiarity with learning and evaluation?



What is evaluation?

Evaluation in philanthropy is systematic information gathering and research about activities that informs learning and drives improvement.

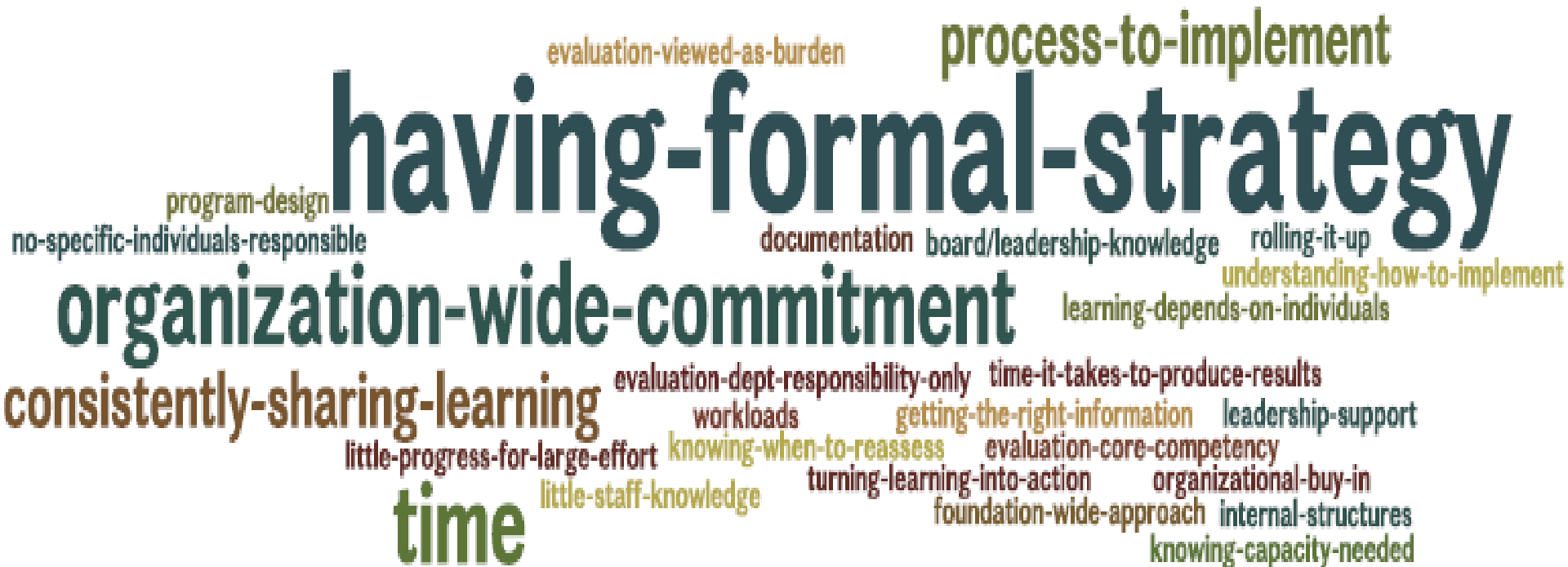
Today's Agenda

1. Welcome
2. Warm-up exercise
3. Overview of the five approaches
4. World café conversations
5. Self-reflection exercise
6. Making meaning group discussion
7. Sharing “Aha!” moments
8. Brief closing remarks

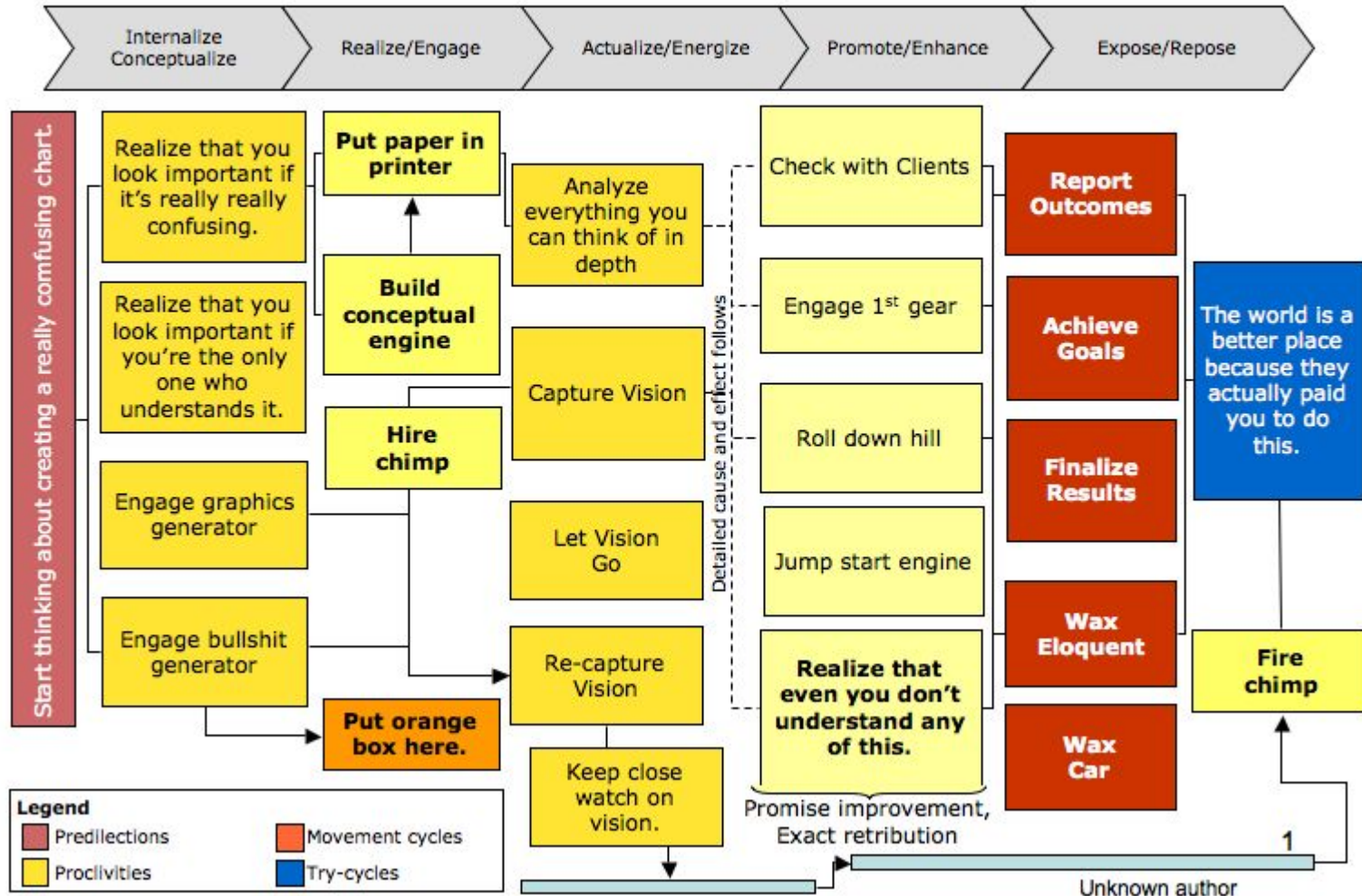
We asked...what's working?



We asked...what's not working?



Logical Model for Creating Achievable and Sustainable Change Modalities over Time



5 recommended approaches

1. It's About Improvement, Not Proof



1. It's About Improvement, Not Proof

“We believe evaluation should not be conducted simply to prove that a project worked, but also to improve the way it works. Therefore, we do not view evaluation only as an accountability measuring stick imposed on projects, but rather as a management and learning tool for projects, for the foundation, and for practitioners in the field who can benefit from the experiences of other projects.”

--W.K. Kellogg Foundation *Evaluation Handbook*

1. It's About Improvement, Not Proof

National Data:

Which purposes do you consider to be very important to evaluation?

Learn about outcomes of funded work (88%)

Learn whether original objectives were achieved (83%)

Strengthen future grantmaking (73%)

Contribute to knowledge in the field (38%)

Source: *Is Grantmaking Getting Smarter?* © GEO, 2008

2. It's About Contribution, Not Attribution



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Women's Funding Network's Making the Case

5 Indicators of Social Change

1. A shift in definition
2. A shift in behavior
3. A shift in engagement
4. A shift in policy
5. Maintaining past gains

3. It's About Learning With Others, Not Alone



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National Data:

Who are the *primary* intended audiences for foundation evaluation results?

Internal audiences ranked first

Foundation staff 88%

Foundation board 78%

External audiences in minority

Grantees 31%

Other grantmakers 10%

Source: *Is Grantmaking Getting Smarter?* © GEO, 2008

3. It's About Learning With Others, Not Alone

Opportunities for sharing learning

- **Sharing** evaluation results, good and bad
- **Partnering** with stakeholders to set common goals
- **Facilitating** learning circles or communities among grantees
- **Embracing** shared measurement and reporting systems
(ex: Cultural Data Project)
- **Embracing** participatory evaluation approaches

3. It's About Learning With Others, Not Alone

Evaluation capacity building is the intentional work to continuously *create* and *sustain* overall organizational processes that make quality evaluation and its uses routine.

Source: *New Directions for Evaluation*, 2002

4. It's About Going Beyond the Individual Grant



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Foundation-Wide Evaluation: Considerations for Design

- **Find** an approach that fits your foundation
- **Choose** what you want to measure
- **Consider** your reasons for evaluation
- **Involve** the board

Source: Putnam, Kristen. "Measuring Foundation Performance: Examples from the Field." California HealthCare Foundation, 2005.

4. It's About Going Beyond the Individual Grant

Foundation-Wide Evaluation: Considerations for Design (cont'd)

- **Locate** responsibility for evaluation in the appropriate spot in the organization
- **Create** an organizational culture that supports learning
- **Examine** tangible progress toward meeting goals
- **Start** somewhere and move ahead

Source: Putnam, Kristen. "Measuring Foundation Performance: Examples from the Field." California HealthCare Foundation, 2005.

5. It's About Embracing Failure

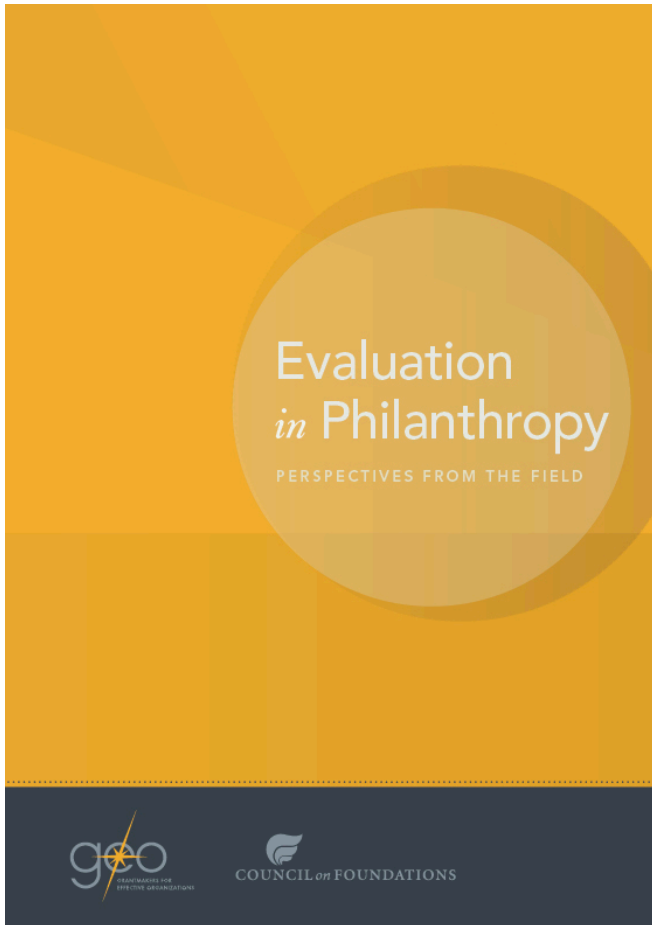


MISTAKES

IT COULD BE THAT THE PURPOSE OF YOUR LIFE IS
ONLY TO SERVE AS A WARNING TO OTHERS.

Sharing experiences with failure

- William and Flora Hewlett Foundation
- James Irvine Foundation
- California HealthCare Foundation



For more information:
www.geofunders.org

Additional Resources

American Evaluation Association, www.eval.org

Innovation Network, www.innonet.org

Foundation Strategy Group, www.fsg.org

Signet Research & Consulting,
www.signetconsulting.com

TCC Group, www.tccgrp.com