**A3. Making the Right Evaluation Choices for your Organization**

Tue Jun 4 2013, 8:30am–10:00am, Concerto A

**Session Designer:**  Lester Baxter, Pew Charitable Trusts

Working list of major considerations and challenges to be discussed at session.

Foundation resources: assets and annual budget; note that foundations may have other resources relevant to evaluation [e.g., convening ability]

* *Rationale*: available resources have direct influence on size and scope of evaluation, and whether evaluation will be staffed as dedicated or dispersed function
* Implications for large, medium, and small foundations

Organizational values, particularly around use/control of information

* *Rationale*: leadership structure and values around information use/flow will play an important role in how evaluation is implemented, and will in turn be affected by creation of evaluation function
* Distinctions between evaluation that is primarily internally focused [serving foundation needs] vs externally focused [serving grantee needs]; also consider accountability vs learning focus [alternatively, program improvement vs foundation decision making focus]

Evaluation purposes

* *Rationale*: identify organization’s information needs [who needs what types of information for which purposes at what times]; shapes decisions about what will be evaluated—individual grants, groups of grants, program[s], foundation, grantmaking strategies; and the more specific types of activities evaluated—grant implementation, service delivery, progress toward outcomes, grantee tactics, and so on
* Distinctions between foundation’s approach [e.g., intentional vs responsive], developmental state [e.g., mature vs emerging/experimental]; need to consider intended use by intended users

Audience needs [evaluation purposes and audience needs are closely intertwined; difficult/impractical to consider one without the other]

* *Rationale*: primary audience for evaluation results shapes nature and rigor of assessment process.
* Draw distinctions between internal [board, leadership, program staff] and external audiences [grantee organizations; grantee/project staff; intended program/project beneficiaries; other funders, including government]; determining which decisions to inform over given timeframe