Evaluation in Philanthropy: Five Approaches to Effective Learning
Pre-Conference Session Synopsis

GEO Learning Conference 2011

Overview:

The following synopsis reflects the perspectives of a group of GEO members who participated in a pre-conference session on approaches to effective learning at the 2011 Learning Conference in Baltimore, MD.

The focus of the session was to explore ways in which GEO members are redefining the role of evaluation in philanthropy in an effort to move beyond just tracking the results and the impact of past philanthropic investments. The session emphasized how grantmakers can do a better job of achieving their goals moving forward.

In this hands-on workshop, participants engaged in five rounds of conversations in order to explore five key approaches to learning that many grantmakers are adopting in order to effectively improve programs and results, and learn practical tools for how they can build these approaches into their own work.

The five approaches to learning that participants explored were:

1. It's About Contribution, Not Attribution
2. It's About Facing Failure
3. It's About Going Beyond the Individual Grant
4. It's About Improvement, Not Just Proof
5. It's About Learning With Others, Not Alone

Learning Approach: It's About Contribution, Not Attribution

If philanthropy embraced this approach to learning successfully, what would we see?	What is the current status of this approach? Challenges to implementation?	What are some ideas to support wider adoption of this approach?
Less "I did" and more "we did" – credit the grantee, not the funder. More truly collaborative funding. Less mechanical theories of change and more nuanced/systems/non-linear understandings. Know if our part mattered.	Board or Executive has an expectation of "credit." Grantees feel they have to prove they were effective/essential/the leader → If you try to figure who mattered it can interfere with the future. We fund organizations – not ideas or movements. Grantees focus on activities/outputs – not outcomes. Hard to identify intermediate results. PR problems – the press wants to give credit or blame. Grantees need to tell a shared story. There may be different definitions of success for different partners.	Focus on collective impact ➢ Educate Board, staff, grantees → culture shift ➢ Make movement-making part of the strategy Need to have a model or theory that includes contributions of multiple players ahead of time. Accept measures beyond quantitative ➢ Paradigm shift on what's of "value" to more adaptive and pluralistic Need awareness of who else is playing a role.

Key Take-Away(s):
➢ Funders need to have strong relationships in order to get a good assessment of contribution, establish realistic role expectations, and build links between grantees working on the same issue.

Learning Approach: It's About Facing Failure

If philanthropy embraced this approach to learning successfully, what would we see?	What is the current status of this approach? Challenges to implementation?	What are some ideas to support wider adoption of this approach?
Failure would be a regular topic on the agenda, discussed frequently. Grantees would be completely comfortable talking with funders about all aspects of their work and sharing information about what is not working as well as what is. Foundations would acknowledge their own role in failure as contrasted to a focus only on the grantee.	It is "not the norm." Some reasons include the different levels within an organization (Board perspective leadership perspective, staff perspective) and the political context. One example: we know a lot about what doesn't work to address obesity but this is not discussed as much as it could be because of a concern that the government or other funder will leave the field. Funders increasingly pay attention to relationships with grantees but it remains a challenge. Perhaps we should not expect that grantees will ever be 100% comfortable sharing all information. But funders should continue to look for ways to encourage the conversation. We are making progress, with a number of foundations writing and talking about failure. But it is still not common.	Engage the Board. Collect better data about progress to help figure out when and how something goes wrong as contrasted to simply realizing at the end that it did not work as intended. When a grant is recommended, discuss the risk assessment with the grantee upfront. Revisit proposal and reporting guidelines to provide opportunities to discuss risk and failures. Continue to provide support after a failure assuming there has been a good response to what was learned. Revisit expectations upfront to assess if they are too ambitious. After a failure, review due diligence findings to see if that process was adequate or should be strengthened. Do a "premortem" to identify possible reasons a project or initiative could fail.

Key Take-Away(s):
- The best perspective perhaps is that everything involves successes and failures – Do not focus on avoiding failure, but on "failing well."
- Think about additional steps or conversations that can and should happen upfront as opposed to a debrief after something goes wrong.

Learning Approach: It's About Going Beyond the Individual Grant

If philanthropy embraced this approach to learning successfully, what would we see?	What is the current status of this approach? Challenges to implementation?	What are some ideas to support wider adoption of this approach?
Engaging grantees and stakeholders. Having a strategy. Common measures.	Limited resources. Collective evaluation. Grantor vs. Grantee in evaluation. Hyper-focus on grantmaking instead of evaluation and learning. Misalignment of strategy and execution (lack of strategy). Paradigm challenge. Lack of infrastructure.	Think about funding networks instead of individual grants. Broaden role of PO's. Multi-year grants. Support "thinking space" conversations. Strategy is key. Defining populations/clusters. Thinking about time differently. Standardized measures. Risk Profile and "big bets."

Key Take-Away(s):
- ➤ Strategy is critical and all stakeholders must place a role in strategy development.

Learning Approach: It's About Improvement, Not Just Proof

If philanthropy embraced this approach to learning successfully, what would we see?	What is the current status of this approach? Challenges to implementation?	What are some ideas to support wider adoption of this approach?
An on-going and improved relationship between grantees and Board of Directors.	"On-going" learning is time and cost intensive → Hard to get everyone's buy-in.	Communicating better with grantees to include the how, why, what we will do with it, and what they can do with it.
Funders thinking about what *they* need to learn and expand their understanding of grantmaking as practice.	BOD likes "proof."	
	POs focus on content/grantmaking, evaluation is not perceived as "sexy."	Setting realistic expectations within foundation and among grantees.
Mid-course corrections and adopt an on-going learning process that takes into consideration more than just the end result.	Picking the right indicators (i.e. what are "mid-range" outcomes?, pressure to look at long-term, what are the "right" indicators of the outcomes we care about?)	Set appropriate and agreed upon indicators
More nimble and responsive to emerging demands and opportunities.		Develop stronger relationships with grantees (i.e. personal visits, calls, etc.)
Open to diverse perspectives on "improvement."	Current granting process successfully continues to get money.	Customize investment to length/depth of grant (be strategic, not <u>or</u> but <u>and</u>, have a plan).
Better outcomes and bigger impact.	Improvement implies failure.	Conduct funder conversations to change the culture.
Open to failure.	The current grantor/grantee relationship.	Ask the right questions – what did you learn? What happened? <u>versus</u> what did you accomplish?
Engaging grantees.	Unrealistic expectation about what can be accomplished in what time.	Be role models for grantees.
	Economic context places focuses on addressing gaps, no room to experiment.	
	Organizational attention deficit.	

Key Take-Away(s):
  ➢ Learning is an on-going process with collectively determined benchmarks

Learning Approach: It's About Learning with Others, Not Alone

If philanthropy embraced this approach to learning successfully, what would we see?	What is the current status of this approach? Challenges to implementation?	What are some ideas to support wider adoption of this approach?
More sharing.	Diverse audience with diverse agendas.	Understand other's approaches.
Consensus – what are we trying to achieve?	Episodic.	Identify what you want to learn together.
Varied perspectives (more information).	There's not enough time.	Take the time.
Relinquish/share power to determine agenda.	Lack of trust and real understanding.	Change emphasis from leadership.
Power can reside with doers	It's not a norm or institutionalized.	Change incentives (attention and visibility).
Unapologetic transparency – learn as we go.	No internal leadership.	Invest in organizations to acknowledge the value of learning.
	Lack of respect with experts and poor prior experience.	Options for grantmaking.
	Bias toward processes with known outcomes.	Share learning criteria and goals with grantees → Dialogue.
	Tension is systematic and organic.	Longer engagements.
	Ego/Hierarchy of whose knowledge is important.	Relationship management.
	Individualism – separations/silos.	Use tools (social media, community of practice, convening, common formats, surveys, sharing, on-going relationship, general operating support, common language).

Key Take-Away(s):
- ➢ Collectivize approaches to learning every step of the way