

Meeting Report: "What's Evaluation Got to Do With It?" September 2004

On May 18, 2004, The French American Charitable Trust (FACT) convened a meeting of selected funders, grantee representatives and evaluators for dialogue around the role and importance of evaluation in supporting community organizing. Entitled "What's Evaluation Got to Do With It?," the meeting involved sixteen persons who have made significant contributions to the social justice/evaluation field. This is a report on the highlights of the discussion that took place.

The meeting was the culminating activity of FACT's Community Organizing Evaluation Project. FACT wanted to share what had been learned in the Project and to provide opportunity for critical reflection about the value, pitfalls and potential of evaluation for advancing community organizing (CO) and social justice. The participants were sent a listing of key issues and a brief questionnaire prior to the meeting that helped shape the agenda. The Project consultants and one of the funder representatives facilitated the meeting with an eye toward assuring that it would be challenging, useful and interesting.

PARTICIPANTS

Funders: Michele Prichard, Liberty Hill Foundation; Tom David, Marguerite Casey Foundation; Margie Fine and Victor Quintana, Unitarian Universalist Veatch Program at Shelter Rock; Alta Starr, New World Foundation; Craig McGarvey, Four Freedoms Fund; Cynthia Schmae, Women's Funding Network; Diane Feeney, FACT.

FACT Grantees: Diane Takvorian, Environmental Health Coalition; Burt Lauderdale, Kentuckians for the Commonwealth; Leroy Johnson, Southern Echo.

Evaluators/Consultants: Chris Brown, Cross City Campaign for Urban School Reform; David Scheie, Rainbow Research; Jim Thomas; Emily Goldfarb; Larry Parachini.

AGENDA NOTES

The meeting agenda was roughly divided into two parts, with discussion necessarily flowing across the dividing line throughout the day. The morning was largely devoted to "Evaluation for Strengthening CO Groups" and featured presentations by Diane Takvorian, Burt Lauderdale and David Scheie. The afternoon — sparked by a role-playing skit "Those Faddish and Fickle Funders — Reaching their Hearts, Minds, and Pocketbooks," with funders playing grantees and vice versa — focused on evaluation related strategies for "Lifting the Visibility and Credibility of CO in the Funding World." The discussion featured presentations by Tom David, Cynthia Schmae, Chris Brown, and Leroy Johnson, giving equal time to perspectives of funders and CO groups on means for impacting philanthropy to benefit CO. The final session, facilitated by Victor Quintana, identified "Common Lessons and Themes, and Next Steps" that emerged from the day's discussion.

EVALUATION FOR STRENGTHENING CO GROUPS

The morning discussion identified effective evaluation practices and the benefits to CO groups of such practices. Participants also considered various issues that make evaluation a difficult challenge for CO groups. Consensus was reached on a number of important points:

Effective Practices — Elements and Benefits

"One size does not fit all! — evaluation must be tailored to the needs of individual groups."

- Developing and tailoring evaluation practices that match up with the particular organizational culture, style, experience, staff/leadership capacities, and constituencies of a CO group takes considerable time and patience and requires sensitive interactions built on trust and transparency.
- Effective evaluation — builds on what the organization is already doing; is linked to the organization's planning at all levels; is continuous and circular.

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- Effective evaluation makes much of what an organization is already doing more conscious, intentional and broadly understood, and more consistently practiced within the organization. In other words, it helps to strengthen organizational practices.
- Effective evaluation requires a serious organizational commitment to systematic data collection and disciplined analysis if it's to contribute to improved planning and decision-making.
- Organizations investing in evaluation can benefit substantially from sustained, hands-on coaching to move through difficulties and maintain momentum.
- Effective evaluation can:
 - > Inform analysis, good planning and decision-making
 - > Produce relevant data to test theories and assumptions and measure progress
 - > Lead to processes that educate and bring leaders into deeper involvement in planning and decision-making
 - > Encourage the organization's work and help leaders see *that they can do it*
 - > Clarify and sharpen what is meant by CO
 - > Make the case for CO groups' value and improve communication for a variety of external audiences

"Organizing is JAZZ – the music, the beautiful result of musicians coming together to creatively express themselves through both the art and science of music, but also in the way it changes and affects people."

Challenges

- For CO groups, time and resources for undertaking evaluation are in short supply. The challenge of involving low-income leaders in evaluation processes – scheduling difficulties, transportation needs and other factors – is a particularly difficult hurdle to overcome on a consistent basis.
- Data collection is toilsome.
- It's easier to document and evaluate at a policy level, but much harder to document and evaluate individual transformation at the leadership level.
- For CO groups, developing a framework and indicators that makes sense can be complicated. It requires clarifying goals and objectives of what will be evaluated, training staff and leaders in evaluation design, and considering numerous indicators and data sources in order to make the best design decisions.
- It's easier to evaluate what a group did rather than what it could/should have done differently.
- Continuous evaluation-related training must be provided to CO groups as new members get involved in the organization and capacities vary over time.
- Organizational fluidity in CO groups is a strength, not a weakness. Finding a way also to measure CO groups' responsiveness to changing situations can help measure organizational strength.
- CO inherently has an evaluation/learning practice built-in. The question is how to harness that learning into something that can be measured.

Unresolved Issues

- How can evaluation at a project level – the usual starting point – be broadened, so that evaluation can contribute to learning processes at the organizational level and, eventually, make understandable the collective impact CO is having on larger social justice/progressive movement issues?

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- How do groups best satisfy funders' desire for quantitative evaluations while building data collection and analysis processes that contribute to internal learning? Are these two goals incompatible with each other?
- How best to integrate the internal learning from and practice of evaluation with strategies that aim to enhance external communications and fund development?
- How can the cost – benefit of evaluation be determined and factored into organizational priorities?

LIFTING THE CREDIBILITY AND VISIBILITY OF CO IN THE FUNDING WORLD

The afternoon discussion focused primarily on whether and how, evaluation-related strategies can help CO groups gain increased stature, respect and support from philanthropy. Clear distinctions were drawn between external, foundation-driven evaluations of CO groups and the internal learning and assessment practices featured in the morning discussion. Benefits to funders and CO groups of external and internal evaluation approaches were considered. Finally, the crucial question of whether internal assessment and learning approaches that strengthen CO groups – strongly supported by all the participants – can also meet funders' needs (those they pursue through external evaluation) was briefly explored.

Consensus was reached around the following points:

- Funders should prioritize supporting internal learning and effective evaluation practices.
- Funding for capacity building, as well as general support funding are the best means to achieve this end.
- Principles for a "Just Evaluation"¹ need to be developed in concerted work by funders, activists/organizers and evaluators.
- CO groups will benefit from the development of a common language about CO and its impacts; evaluation can help make this happen.
- The participatory nature of CO – and goals of transformative change – require a different kind of evaluation than the type(s) currently in vogue, often geared to measuring results of social service delivery.
- External evaluations driven by funders are intended to meet funders' needs and rarely are developed with thought about how they might contribute to grantees' learning. Funders have various needs for evaluation. Competing needs and/or audiences for a particular evaluation can lead to poor design and outcomes.
- Many foundations want concrete documentation of CO groups' work and impact; CO groups' culture is one of storytelling. This is a dilemma difficult to overcome but a fundamental challenge that the participating evaluators have helped CO groups to take on with some success. All agree that more work is required here.
- Other issues affecting the way that CO groups might strategize around evaluation for attracting greater foundation support include:
 - > Evaluation and reflection are naturally part of good organizing, but this alone does not meet foundations' needs
 - > Building the power of the people is the essential goal of good organizing. Most foundations are hesitant to acknowledge and support building power. Can this thinking be changed? How can it be changed? How does evaluation contribute to this kind of change?
 - > Foundations vary in how they make decisions, what they value, and their understanding of CO, etc. An approach that is useful for one may not meet the needs of others. How can this be dealt with through evaluation-related strategies?

¹The term "Just Evaluation" informally describes an evaluation process that is responsive to grantees by reflecting the work they do, their needs and allowing them to lead/co-lead the process to ensure that it helps build the organization. This term was used by the participants of the Gray Rock conference in Canada in September 2003.

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Guidance for CO Groups' Strategies

Evaluation can help make the case for CO groups in gaining increased visibility, credibility and funding if:

- * Evaluation is tied to communications and media strategies.
- * Evaluation is one of many strategies for making the case for increased support.
- * Stronger evidence-based stories are produced.
- * Advocates for CO in the funding world and among evaluators are jointly involved with CO groups in developing and implementing evaluation-related strategies for increasing philanthropic support.

KEY CONCLUSIONS REACHED BY PARTICIPANTS

- #1 Greater attention to the benefits of, and increased support for, evaluation to strengthen CO groups is required from funders.
- #2 Some very useful tools and models exist and are being further developed for assisting CO groups to develop frameworks, indicators, processes, and other elements of evaluation practice to meet their particular needs. (A number of them were presented at the meeting and are included as links on our web site). Evaluations that strengthen CO groups require tailored efforts, there is no "one size fits all model," and this is time consuming work.
- #3 Effective evaluation must be tied and contribute to CO groups' decision-making and program planning.
- #4 Evaluation can benefit CO groups internally in many ways — strengthening their program planning and decision making, improving their belief in the value of what they're doing, providing a means for learning and growth. And, it can benefit CO groups externally by enabling them to tell and market their stories and raise funds.
- #5 Evaluation processes that work for CO and other social change groups requires modifications in traditional evaluation practices. In addition, CO groups must overcome a lack of understanding about what they do, how they do it, and their impact. Meeting participants expressed their willingness to work on strategies to help CO groups do this.
- #6 At the same time, evaluation-related strategies are not a silver bullet in increasing support for effective CO. Evaluation should be seen as a way to benefit CO groups internally as well as increasing support from philanthropic sources.
- #7 Many topics surfaced at the meeting that could not be pursued in depth. Among them were issues around the feasibility and importance of meeting funders' needs for quantifiable outcomes; how and whether conducting evaluation *from the inside out* and *from the bottom up* can meet funders' needs; how money spent on external evaluations by many funders can be partially re-directed to internal assessment and learning evaluation practices that strengthen CO groups; how evaluation efforts can contribute to development of a meaningful common language of CO that helps educate funders to CO's value without compromising what CO tries to do in building power; and many others.
- #8 How to measure the overall impact of CO is a major question requiring continued discussion. How do we quantify the combined impact of the various organizing efforts around the country that have as a central goal to increase the voice and power of disenfranchised communities? How do we measure the role of real constituency-led organizations in changing power dynamics in order to create more just institutions and conditions? All participants agreed that this topic required continuous conversation among a diverse group and many expressed a desire to participate in future meetings where this topic and related ones could be considered in depth.

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FOLLOW-UP PLANS

AS OF JUNE 30, 2004, THE FACT CO EVALUATION PROJECT HAS ENDED. A follow-up meeting was held in Boston in September to continue the conversation. Interested funders should contact Diane Feeney at FACT for further information.

Please note also that there are other ongoing social change/evaluation initiatives taking place that may hold promise for advancing goals shared by the meeting participants. These include:

- ✓ Work that David Scheie of Rainbow Research (dscheie@mtn.org) is facilitating among a cohort of faith based organizing groups, through the James Irvine Foundation's Organized Religion Initiative. For more information or for a copy of the report "What's Faith got to do with it,?" please visit: www.rainbowresearch.org and click on Our Newest Resources.
- ✓ Leadership that Chantel Walker of Marguerite Casey Foundation is providing to facilitate ongoing discussion among a wide range of grantmakers with interest in improving evaluation efforts targeted to social change groups.
- ✓ The Women's Funding Network is actively developing several new evaluation tools for grantees and funders, and testing and presenting its findings to audiences in the U.S. and internationally. For more information, please visit: www.wfnet.org.
- ✓ The Cross City Campaign's Indicators Project continues to provide evaluation guidance for funders and CO groups interested in community organizing around school reform. For more information, please visit: www.crosscity.org/programs/indicators/findings.htm
- ✓ Ongoing work resulting from a conference at Gray Rocks (Canada) that has brought together US-based and international activists, organizers, researchers, and funders to engage in a dialogue around practical strategies for deepening and increasing support for social justice groups' approaches to assessment and learning. For more information, please visit: www.communitylearningproject.org.

The FACT website provides links to each of these efforts. Participants at the meeting also felt strongly that all who are interested in this subject, and in advancing CO, should seek opportunities at various philanthropic forums for discussions aimed at improving evaluation practice and learning for funders, evaluators and organizers. Meetings of the Council on Foundations, Neighborhood Funders Group, National Network of Grantmakers, Regional Associations of Grantmakers, and others are possible venues. Also, they believe that opportunities for dialogue should be sought as well at various convenings primarily directed at and/or led by CO groups. ■