

Strengthening Grantees to Better

BY DIANE V. FEENEY

Foundations need to **help strengthen their grantees** so the grantees can **provide them with the outcome data they need.**

From 1999 to 2004, the French American Charitable Trust (FACT), a small family foundation based in San Francisco, began a community organizing evaluation project to strengthen community-based organizations by focusing on evaluation strategies. We hired a two-person consulting team to develop an evaluation methodology in collaboration with our grantees. This project was focused on community-based organizations (CBOs) that use organizing as a primary strategy, but some of the learning is applicable to all social change organizations.

Here is what we would tell other foundations about evaluation projects:

- Foundations need to think about evaluation in terms of strengthening groups. Strong groups have a clear mission, one or several strategies, experienced staff, tools for measuring and reporting outcomes, and strong executive leadership and board members. Strong groups can demonstrate better outcomes because they have good systems in place. Foundations need to help strengthen their grantees so the grantees can provide them with the outcome data they need.

- Foundations need to think about linking evaluation processes to organizational development. Evaluation systems should be linked with planning, priority setting, decisionmaking and internal

learning processes. To do good evaluation, organizations need to have those basic systems in place. If they don't have those systems, they need organizational development consultants, not evaluators.

- Foundations need to be clear about their indicators of success with grantees to ensure that they know what a foundation is looking for and how they can most effectively show their impact. Often foundations are not very clear with grantees about how they determine "success." There are as many different criteria as there are foundations. What is success? A campaign victory, community involvement, fundraising success, how many people were affected? Most grantees hope that something in their annual reports will strike a chord with the reviewing program officer without knowing what to focus on.

- Foundations need to separate out their need to measure their own grantmaking impact with their need to gauge their grantees' impact. Many program officers and executive directors feel pressure to show the effects of their grantees' work to their board. The impact of a grantee organization and that of a grantmaking foundation are two important, but distinct things that need to be approached separately.

Grantees as Teachers

When we undertook our evaluation

project, we never anticipated it would take four years to complete, nor did we anticipate the extent of the commitment, vibrancy and determination of our grantees. Here are some of the lessons they taught us:

1. One size does not fit all. We quickly realized that each organization had complex and distinct methods for approaching its mission. Creating a single methodology doesn't work, especially for community organizing groups that have non-linear approaches and work to empower and organize low-income populations.

2. Groups want to concentrate on internal learning and assessment as much as foundations do. Most of the groups have internal learning procedures and data collection systems. They need help turning that learning into outcome data for themselves and their funders and integrating it into their planning and decisionmaking systems. When groups are also stretched thin, priority tends to go to programmatic concerns instead of an overhaul of their internal systems.

3. Outside evaluators who are not familiar with organizations and their strategies are not good at evaluating impact. Good evaluations leave something behind and are not seen as a lot of extra work for the grantees. Good evaluators are respectful of organizational culture, develop evaluation processes

Evaluate Them

from the ground up and tailor them to the groups' needs.

4. It takes a long time to measure impact on a societal level, but groups are doing it on the programmatic level. Groups need help translating their data and analysis into outcome data on a macro level. It's easy enough to show impact on a program level, but on a macro, societal level, it's harder to do. It's a work in progress for both groups and foundations.

Since completing our evaluation project in May of 2004, we convened some professional evaluators as well as foundation colleagues to discuss some of our findings. We had a very rich discussion on the pitfalls, challenges and potential of evaluation for advancing community organizing and social justice. Here are some of the changes that we made to our reporting and evaluation requirements based on our evaluation project experience.

- We are in the process of making changes to our reporting requirements so that we can better understand how grantees think about planning and evaluation and what their needs are for turning internal learning into outcomes.

- We encourage our grantees to apply to us for discretionary funding if they wish to hire consultants to help them with planning, learning and evaluation.

- We are convening other funders to think about their own evaluation procedures.

- We are supporting an effort by Andy Mott at the Community Learning Project to create learning groups of social change organizations so they can strengthen evaluation and organizational learning. For more information, visit: www.communitylearningproject.org.

- We plan to list our indicators of success on our website (www.factservices.org) and communicate them to our grantees.

After the May 2004 meeting, several foundations agreed to continue to meet on this topic and a meeting was held at the Neighborhood Funders Groups (NFG) in Boston in September 2004. Another meeting is scheduled in Phoenix for September 2005.

For More Information

For more information on the group of foundations interested in evaluation strategies for community-based organizations, please e-mail Myra Bicknell at mbicknell@factservices.org. For more information on FACT's evaluation project, please visit www.factservices.org and click on Evaluation Project. **FNC**

Diane V. Feeney is president of the San Francisco-based French American Charitable Trust.



Case Study: Environmental Health Coalition (EHC)

In 1999, the San Diego-based Environmental Health Coalition (EHC) undertook a process of formulating and integrating ongoing evaluation in its Social Change for Justice Model (a framework that incorporates EHC's ideology with a method of evaluation, planning and working to increase the organization's ability to accomplish its goals of social and environmental justice). Because of this work, and in collaboration with FACT consultants, EHC made the following changes:

1. Designed a planning and evaluation framework that helps to provide critical information to measure progress as well as guide planning and decisionmaking within each campaign and for the organization as a whole

2. Integrated evaluation practices into all aspects and all phases of organizational and campaign planning through their Process for Action—a disciplined method for collecting and examining information, making informed and strategic decisions, developing work plans consistent with EHC resources and ideology, and improving overall effectiveness

3. Incorporated evaluation questions and data collection tools into the protocols designed to guide all key aspects of the organization's day-to-day work.

Because of this work, EHC has a rigorous assessment and documentation practice—not only at the end of a project or a campaign, but also throughout all stages of its day-to-day work including at strategic moments of a campaign and during its annual review. For more information, visit www.factservices.org and click on Evaluation Project and the Environmental Health Coalition's Social Change for Justice Model Flash Presentation.