Learning and Evaluation: Asking the Right Questions, Getting the Right Information
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What do you hope to learn in this session?
1. Participants will be introduced to basic evaluation concepts and how those can strengthen grantmaking.

2. Participants will understand how different evaluation concepts and activities can help advance equity and inclusion.

3. Participants will begin to develop ideas for how evaluation and learning might fit into their own work.
How was your commute this morning?
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**Approach #1**

- Terrible
- Bad
- Mediocre
- Good
- Awesome

1 2 3 4 5
How was your commute this morning?

Approach #2

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<tr>
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How was your commute this morning?

Approach #3

Tell me about your commute to NGI this morning...
Defining Evaluation
“Evaluation in philanthropy is systematic information gathering and research about grantmaker-supported activities that informs learning and drives improvement.”

_Evaluation in Philanthropy: Perspectives in the Field_
Produced by Grantmakers for Effective Organizations and Council on Foundations
“Evaluation in philanthropy is systematic information gathering and research about grantmaker-supported activities that informs learning and drives improvement.”

*Evaluation in Philanthropy: Perspectives in the Field*

Produced by Grantmakers for Effective Organizations and Council on Foundations

- Enable you to make better decisions
- Connect to other plans and activities in your foundation
- Help you better engage with grantees and partners
“Evaluation in philanthropy is systematic information gathering and research about **grantmaker-supported activities** that informs learning and drives improvement.”

*Evaluation in Philanthropy: Perspectives in the Field*

Produced by Grantmakers for Effective Organizations and Council on Foundations

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**Evaluation should...**

- Help grantmakers distinguish between attribution and contribution
- Know its own limitations
- Enable you to make better decisions
- Connect to other plans and activities in your foundation
- Help you better engage with grantees and partners
“Evaluation in philanthropy is systematic information gathering and research about grantmaker-supported activities that informs learning and drives improvement.”

Evaluation in Philanthropy: Perspectives in the Field
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Evaluation should...

- Have a plan and structure
- Draw on social science research
- Adapt methods to be culturally responsive
- Help grantmakers distinguish between attribution and contribution
- Know its own limitations
- Enable you to make better decisions
- Connect to other plans and activities in your foundation
- Help you better engage with grantees and partners
Why Evaluate?
What are some reasons your foundation might want to engage in evaluation?
Why Evaluate?

Accountability and stewardship of resources

• Old school: Hold grantees accountable to foundation
• New school: Hold foundation accountable to its own mission and the community
Why Evaluate?

Learning in order to amplify impact

- Understanding causal pathways
- Showing what works
- Correcting course on a funding strategy
- Empowering grantees with data
Principles for Good Evaluation

American Evaluation Association Ethical Principles

- **Systematic Inquiry**: Conduct data-based inquiries that are thorough, methodical, and contextually relevant

- **Competence**: Provide skilled services to stakeholders

- **Integrity**: Behave with honesty and transparency in order to ensure the integrity of the evaluation

- **Respect for People**: Honor the dignity, well-being, and self-worth of individuals and acknowledge the influence of culture within and across groups

- **Common Good and Equity**: Contribute to the common good and advancement of an equitable and just society
How might your foundation’s mission and values influence an approach to evaluation and learning?
Crafting Evaluation Questions
Evaluations are designed to answer to questions...

...but there are always so many questions!
Good Evaluation Questions Should...

- Be developed with stakeholders
- Be reasonable and answerable
- Shed light on how things have changed
- Explicitly address culture, equity, and/or how different groups may experience disproportionate impact
What evaluation questions would you ask?
Evaluation in practice
Evaluation Approaches in Philanthropy

- Individual grant or grantee
- Portfolio or initiative
- System or structural
Using Evaluation Info at Foundations

• Articulate what the foundation and its grantees accomplished

• Shape the future of a grantmaking portfolio

• Foster conversation with grantees and other stakeholders

• Encourage collaboration with other funders
Challenges to Using Evaluation Info at Foundations

- Lack of buy-in or unclear “ownership” of evaluation within foundation
- Disconnect between staff and board on benefit of evaluation
- Evaluation is a burden on and/or doesn’t give back to grantees
- Pivot in foundation’s strategic direction makes an evaluation less relevant
Sharing Evaluation Findings

Reports

Grantee Convenings + Learning Sessions

Summaries + Briefs

External Communication
Thank You!

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