

## KEY POINTS FROM USP EVALUATION DISCUSSION – JULY 25, 2011

### Learning / best practices

- Recognition that we are not starting [evaluation discussion] from scratch. There is a lot going on but lessons are not shared. There has to be an emphasis on what we are learning from our work.
- There are good evaluation practices within USP that we need to socialize and learn from. Baltimore mentioned evaluation approaches by their CATG, education and youth programs.
- Social media groups and arts & culture groups may have specific examples of good evaluation practices.

### Grantmaking

- How is evaluation linked to our grantmaking processes? How to make the most of proposals and reports as tools to capture data and lessons?
- We should not jump to the conclusion that we should be doing lots of external evaluations, there are other things we could do (i.e. Baltimore has introduced a “return on investment” section in their write-ups).

### Organizational culture and structure

- How does the foundation need to be differently structured, staffed, funded to make [this re-energized focus on evaluation] possible?
- Recognition that an emphasis on evaluation implies a certain culture in the organization. What does this mean and how does it impact staff?
- How to become more rigorous around evaluation without becoming more burdensome to grantees and shifting parts of our culture that we value (risk-taking, flexibility)?
- There is a need for common vocabulary – we should talk about this more, make it more explicit to our Board(s), ask specific questions of our grantees.
- Need to develop a common language not just amongst ourselves, but between us and the Board.

### Approach to evaluation

- Can we have one evaluation approach for USP or would it make more sense to think of a flexible framework that would allow the various funds/campaigns to select the approach(es) that make more sense to them? How to build an institutional bias towards evaluation that allows this type of flexibility?
- How much of the evaluation effort should we be leading ourselves vs a more collaborative approach with grantees?
- Acknowledge the “fear factor” of evaluation and the sense of being “exposed” via an evaluation.
- How heavy handed would we want to be with our grantees? We have never been an “interventionist” foundation.

### What do we want to evaluate?

- What is the role of evaluation when program goals may be a moving target?
- Should we be evaluating fields or individual grantee organizations? What would demonstrate more impact? Recognize that some of the fields we support yield more easily to evaluation than others.
- How much should we be evaluating our strategies vs. our grantees?

- What timeframe are we thinking of when it comes to evaluation? Are we looking for quick change or long-term change? Is there a clear understanding that field building is a long term process? And how would our internal process, in particular our budgeting process, affect this timeframe?
- There is a lot of focus on measuring impact at the policy level, but what about measuring impact at the “hearts and minds” level?
- Evaluation is not always about measuring impact (as the article discussed, it can also be about measuring capacity and progress) – how do we convey this message to the Board?
- Ask ourselves – is this necessary? Do we care having a measure of impact? What happens when evaluation data is “off” – that does not mean that our work is not relevant or necessary and should be discontinued.
- How does the drive toward evaluation fit within USP’s increased focus on campaign work?
- This conversation can happen without the increased focus around campaign work, it could have happened five years ago.
- We are all, always, evaluating (i.e the choices we make around grants)

#### **Next steps:**

- Map current good evaluation practices, challenges, questions, within USP
- Map fields we fund where evaluation is clearer
- Look at our own internal grantmaking processes
- Look into case studies and experiences from other foundations
- Board synergy - Make sure we are in the same page with our Board