



# SUMMARY REPORT OF THE MEDINA FOUNDATION EVALUATION GRANTS

*Prepared for*

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## **BACKGROUND**

In celebration of its 60<sup>th</sup> anniversary, the Medina Foundation provided special Evaluation Grants<sup>1</sup> to nonprofit organizations across the greater Puget Sound area. The grants were intended to strengthen organizations' evaluation capacity, and grantees were also expected "to demonstrate strong leadership by learning from these evaluation efforts and strengthening their program delivery based on these learnings."<sup>2</sup> Organizational Research Services provided consultation and guidance to the Medina Foundation in the development and implementation of these grants. In their grant applications, organizations selected specific evaluation purposes, choosing to develop or revise one or more of the following: logic models; evaluation design; data collection methods or tools; data analysis procedures; processes for communicating data; and/or processes for using data to strengthen programs.

The prospect of this grant proved very popular from the beginning – when the Foundation offered information sessions, 86 organizations attended. During the review of applications that followed, many organizations demonstrated great potential for these grants. Ultimately, the Foundation selected 12 organizations for awards ranging from \$15,000 to \$25,000 and awarded the grants in October 2007. The grantees are: Child Care Resources; Family Services; Food Lifeline; Hopelink; New Futures; Technology Access Foundation; Treehouse; Vashon Youth and Family Services; Vision House; Downtown Emergency Service Center<sup>3</sup>; and Whatcom Literacy Council.

These grantees were expected to participate in two "Learning Circles" during the year, which were facilitated conversations among the group of grantees on their ideas and experiences regarding evaluation. Additionally, grantees submitted Nine-Month Reports in July 2008 reflecting on their experiences of the grants. The following are five highlights, or key learnings, from the second of the two Learning Circles and the grantees' Nine-Month Reports.<sup>4</sup>

## FIVE HIGHLIGHTS

### **1. A discrete, relatively small investment in evaluation provides big pay-offs.**

While strong evaluation does require consistent resources, often a one-time investment jump-starts an agency's evaluation efforts. For example, a relatively small but valuable investment is the purchase of new database technology, which offers more efficient and sophisticated learning and reporting. It also relieves pressure on staff resources by eliminating excessive paperwork and burdensome filing systems (one agency that purchased a new database with their grant dollars described its prior data collection process as "painfully difficult"). Another common discrete need is to freshen up an obsolete logic model or theory of change<sup>5</sup>, because when these tools are obsolete, the rest of the agency's evaluation efforts sit on a shaky foundation. Child Care Resources, for example, updated its three-year-old theory of change to accurately reflect its current approach, and reported that this was an essential first step towards more rigorous evaluation. Most agencies acknowledged that evaluation is a large and complex endeavor, but that discrete investments in basic evaluation infrastructure are a big piece of the effort. As the Technology Access Foundation reflected, "Over time, [evaluation] costs will be reduced once the proper tools are in place."

### **2. Support for agency-influenced evaluation creates a culture of reflecting and learning.**

Grantees consistently pointed out the value of actively shaping their own evaluation work, rather than solely conducting evaluation to fulfill the requirements of funders. Many grantees expressed frustration that different funders have different expectations, and often require evaluation for the purpose of accountability which hinders learning and adjustment of services. As New Futures pointed out, "In general, funders require, but don't support, evaluation." On the other hand, agency-influenced evaluation, as made possible by the Medina Foundation grants, allows agencies to add a focus on *learning* rather than solely on reporting. These grants have catalyzed cultures of learning at many agencies, leading them to be increasingly reflective about their work and to commit to improving their services based on learning from evaluation. When it is internally motivated, evaluation becomes more than just a tool for obtaining resources from and reporting to funders, but a tool to reflect, learn, and continually improve.

### **3. Strong evaluation in a single organization can build the capacity of the field.**

Two grantees, Treehouse and Child Care Resources, utilized these grant dollars to start the process of moving towards development of an *evidence-based program* (EBP). This means that with strong, rigorous evaluation over the long term, an agency may demonstrate that its service model consistently leads to specific outcomes for the individuals, families, and/or communities it serves. Other organizations can then replicate or adapt these evidence-based programs to serve similar populations across the nation. To reach this level of evidence is a long-term endeavor, requiring multiple years; during this past year, these two grantees were able to take the early first steps. In the shorter term, a single organization can also develop measurement tools or processes that will be widely useful. For example, Downtown Emergency Service Center (DESC) prioritizes its services for the most vulnerable among homeless adults. In order to apply this organizational goal objectively and consistently, DESC developed a tool to quantify vulnerability based on psychological, physical and cognitive disabilities. For its own use, and because other homeless-serving organizations across the country are interested in this tool, DESC used its grant

to have the Assessment of Vulnerability Tool independently evaluated for reliability and validity. New Futures, another example, wants to influence its field with its evaluation, so it is using part of its grant to document its learnings to share with others.

#### **4. The perspective of a “critical friend” is essential to effective evaluation.**

Whether it’s an external consultant or an internal staff member dedicated to evaluation, a critical friend is a trusted person that asks provocative questions and provides critiques as an advocate for the agency’s success. While staff are usually focused on the frame of their service delivery model, an outsider with an objective and evaluative mindset can reveal assumptions and coax staff outside of their usual box of thinking in order to support learning and improvement. Most grantees used at least some of their grant dollars to hire an external consultant, and several invested in internal evaluation staffing, both of which also provide evaluation expertise often not available among existing staff. Treehouse described how an external consultant helped staff recognize their assumptions by guiding how they look at change: “Many of the indicators we thought were appropriate were looking at change in the wrong place. For example, we believe that our advocacy services decrease school discipline, but we were seeing this as a change in the youth when really it is a change in how the schools administer discipline based on our interventions.” Treehouse staff were then able to shape their evaluation to measure changes in schools, rather than among youth.

#### **5. Evaluation is important for organizations at any stage in the process.**

As the grantees’ comments demonstrate, evaluation is important at any stage, from early program development, to grant writing, to reporting to the community, to building capacity and expanding a program, and more. Among the grantees’ reports and comments at the Learning Circle, there are a variety of examples of the importance of evaluation at these various stages. Technology Access Foundation noted that its new evaluation processes into grant applications will be increasingly important as it goes after highly competitive national grants. Related to program development, Hopelink said that “one of the most important lessons the process has revealed is to build the evaluation process into programs as they are developed whenever possible” in order to logically link strategies to intended outcomes from the beginning. Vision House discovered the importance of evaluating how their clients found success, in order to continually improve service delivery. Finally, grantees realized that evaluation is a critical part of their day-to-day work, purposefully building evaluation into staff work plans at every stage.

## **CONCLUSION**

The Medina Foundation’s 60<sup>th</sup> Anniversary Evaluation Grants demonstrated that when agencies have sufficient resources and the autonomy to shape their own evaluation work, evaluation increases organizations’ capacity and enthusiasm to learn and improve services, and ultimately supports improved outcomes for individuals, families, and communities. It is hoped that these five insights, made possible by the Medina Foundation’s leadership, will be helpful and instructive to guide future grantmaking strategies, and that they can be shared more broadly with others in the philanthropic and nonprofit fields.

# **APPENDIX A**

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## ***QUESTIONS FOR MEDINA FOUNDATION EVALUATION GRANTEES<sup>6</sup> FOR LEARNING CIRCLE AND NINE- MONTH REPORTS***

Briefly describe how you have used your Medina evaluation grant to date (please note if anything has changed from your original proposal).

1. In what ways has this grant affected your organization's capacity for evaluation?
2. In what ways has this grant affected your view of evaluation?
3. What did you learn from this grant about the costs/resources required for evaluation? (E.g., external consultants, database development, staff time, technology purchases.)
4. In what ways has your organization institutionalized evaluation, currently or potentially? (E.g., staff for evaluation, incorporating evaluation costs in operations grant requests, scheduled time for reflection/learning.)
5. Has this grant affected your communication with funders about your organization's approaches to evaluation? Please explain.
6. In what ways could grantmakers better support evaluation efforts?

*(Note: These questions guided both the second Learning Circle in June 2008 and the grantees' Nine-Month Reports, which were submitted to the Medina Foundation in July 2008.)*

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## Notes:

<sup>1</sup> In addition to the special Evaluation Grants, the Medina Foundation also offered special Strategic Planning Grants.

<sup>2</sup> From *The Medina Foundation Funding Guidelines for Evaluation Grants*

<sup>3</sup> Downtown Emergency Service Center received their grant several months later than the other grantees.

<sup>4</sup> The second Learning Circle and the Nine-Month Report were both guided by the same set of questions; see Appendix A.

<sup>5</sup> A logic model is a visual model listing an organization's activities, intended outcomes, and goals; a theory of change is a more complex visual model that shows the theoretical linkages among the activities, intended outcomes, and goals.

<sup>6</sup> Questions prepared by Organizational Research Services, 2008.