



The John R. Oishei Foundation  
**EVALUATION GUIDE**

Fall 2018



JOHN R. OISHEI FOUNDATION

## Introduction

The John R. Oishei Foundation is a place-based private funder in Western New York with a mission to enhance the economic vitality and quality of life for the Buffalo-Niagara region through grantmaking, leadership and network building.

The Oishei Foundation has a deep-rooted desire to understand its impact, engage in continuous learning and hold itself accountable. In 2008, the Foundation created the Knowledge Management office to lead and coordinate its evaluation activities.

This document describes the Foundation's vision for measurement and evaluation, and its approach, which is informed by best practices from across the field.



## Evaluation Vision Statement

In order to add clarity, focus and transparency to our evaluation practices, the Foundation created the following Evaluation Vision Statement in early 2018. The purpose of an Evaluation Vision Statement is to reflect on why we value evaluation activities and how we plan to use evaluation findings.

**“The John R. Oishei Foundation commits to practicing effective evaluation and learning in service of our broader mission. We use evaluation to guide strategic decision making; to build our own and our grantee’s capacities; and to understand, share, and act on lessons learned.”**



## Evaluation Core Principles

Based on best practices, the Foundation also created a set of Core Principles that guide our approach to evaluation.

*In our evaluation efforts, we strive to be....*

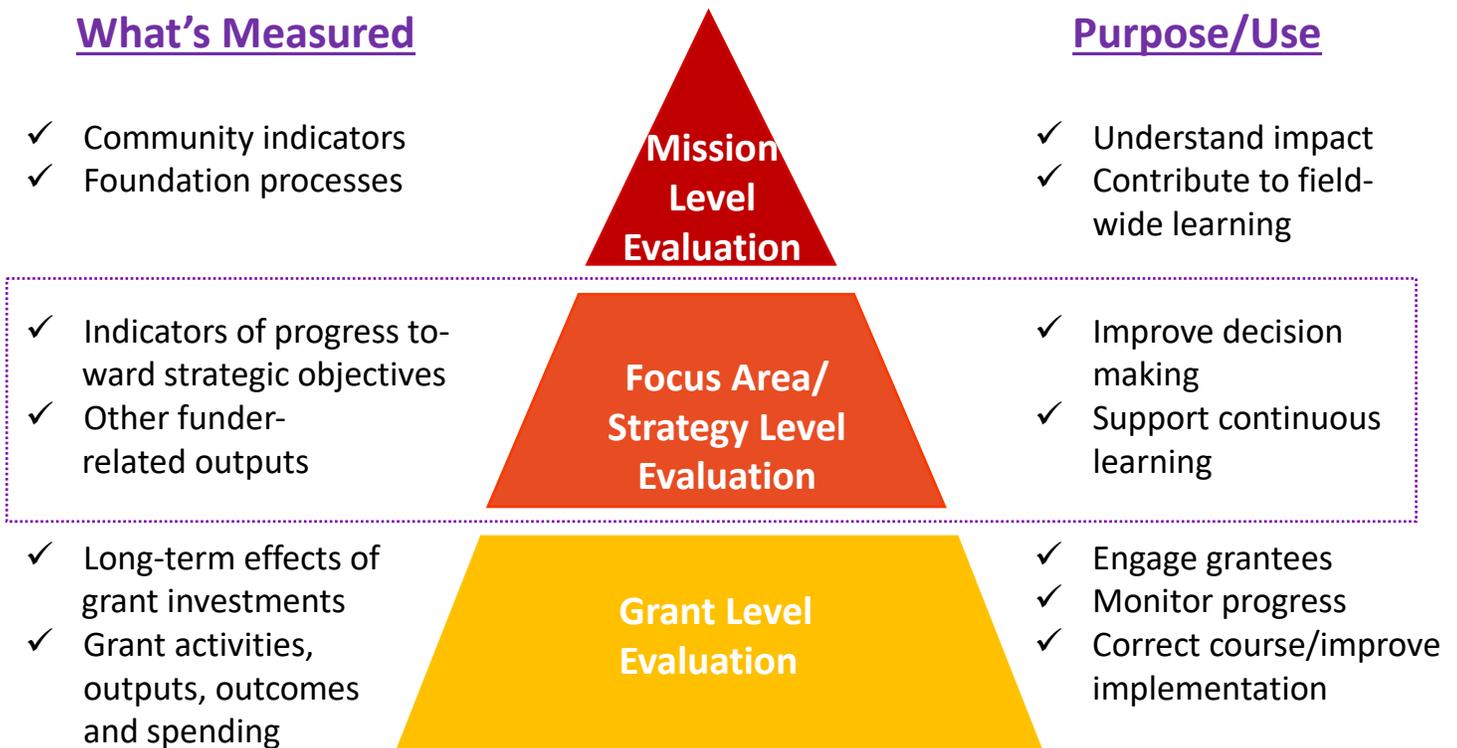
- 1. Effective.** In partnership with our grantees, we will identify opportunities to use quantitative and qualitative information to guide strategic decision making.
- 2. Responsive.** Our grantees work across multiple dynamic and complex issue areas, requiring our evaluation methods to be flexible and adaptable vs. a one-size-fits-all approach.
- 3. Collaborative.** We work with grantees and community partners to deepen our understanding of the problems we seek to address, capture lessons learned and share knowledge that will increase our collective impact.
- 4. Resolute.** We strive to minimize the reporting burden on grantees by keeping our focus on what's most important. We seek to assist and empower our grantees and colleagues with meaningful information about long-term outcomes and broader impacts on society.



## The Evaluation Pyramid

At the Oishei Foundation, evaluation and learning efforts are not just the purview of the Knowledge Management office. Rather, evaluation and learning is a culture and set of practices that intertwines with every aspect of our work as grantmakers.

Evaluation includes all data and information collection and analysis at three distinct levels within the Foundation: (1) individual grants, (2) strategic objectives within Focus Areas, and (3) the overall mission of the Foundation. The visual below illustrates how evaluation transpires at multiple levels within the Foundation's work and across its functional areas.



Historically evaluation activity at the Oishei Foundation has concentrated at the grant level. Our Evaluation Vision Statement and our Annual Operating Plan (an annual planning effort) call us to shift the emphasis, focusing the majority of our staff time and strategic investments at the Focus Area/Strategy level of evaluation.

## Mission Level Evaluation



The Oishei Foundation is committed to understanding its impact and tracking progress against its overall mission. We aspire to benchmark our progress against our mission using key indicators of wellbeing in the community. We strive to learn from our work and contribute knowledge to the field. We also track the efficacy of our grantmaking practices by engaging grantees and organizations dedicated to supporting funders in improving these practices.

## Focus Area/Strategy Level Evaluation



The Oishei Foundation makes grants within and across five focus areas. Funding for each area is geared toward the objectives outlined in the Foundation's strategic plan. Program Officers review and revise strategies on an annual basis to ensure progress towards these goals. To inform this process, foundation staff analyze information from grantee reports, publicly available data, and trends in the community.

## Grant Level Evaluation



To evaluate the efficacy of our individual grants and support our grantees in continuous learning, we regularly monitor the progress of programs and projects, including outputs and spending. We strive to minimize reporting requirements and focus our energy on the most important information that informs decision-making for grantees (e.g., opportunities to make program improvements) and foundation staff (e.g., funding opportunities and renewal decisions). When necessary, we also support evaluations that monitor and measure outcomes from long-term funding commitments.



## Building a Culture of Learning

It is important to emphasize that evaluation is not just a set of measurement activities. The Oishei Foundation views evaluation as an integral practice within a broader commitment to being a learning organization.

We firmly believe that evaluation practices can be woven into our grantmaking and strategic planning cycles to drive better decision-making, help course-correct implementation, and learn as a philanthropic community.

At the Oishei Foundation, evaluation is not a new activity. But our approach is evolving, so that evaluation is a mindset that all staff bring to their everyday work. In thinking about the Evaluation Pyramid, we recognize that it is not built from the base up, but rather it is constructed outward, beginning from our core commitment to learning.

## Focus on Contribution (vs. Attribution)

One of the perennial debates in philanthropy is whether funders should measure their success in terms of *contribution* (i.e., aiding efforts or facilitating an outcome) or *attribution* (i.e., solving a problem or causing an outcome). Each is a valid approach in different contexts.

The Oishei Foundation believes that when addressing complex problems, it is especially difficult to isolate one organization's influence on an outcome. Our mission rivets our focus on some of the most challenging issues that involve systems change, scale and broader community impact. Therefore, most often, we seek to understand our and our grantees' *contribution* to solving these problems.

Using this approach can lead to more long-term investments with evaluation as an integral element of our strategy, providing important insight into what works, what does not, and why.



## Looking Ahead

Evaluation and learning are, by definition, continuous processes. The Oishei Foundation is eager to continue to develop its evaluation practices and build a culture of learning that is stronger and in even closer alignment with its Evaluation Vision Statement and Evaluation Core Principles.

The next steps and aspirations on our horizon include a review and revision of our grant reporting process, which we recognize could offer many benefits from streamlining. We will also strive to create opportunities for more meaningful engagement among the foundation staff, our board of directors, and our grantees, with an emphasis on having more open dialogue about measurement, evaluation and reporting.

In the spirit of contributing what we learn to the field, we plan to engage with funders and our community of stakeholders in Western New York and beyond as we continue to evolve our evaluation practices.

