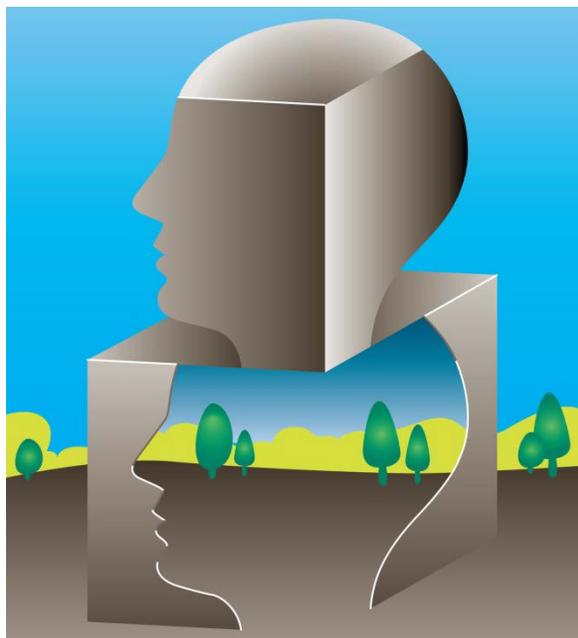


# Reimagining Evaluation and Learning

---

Blog Post: Fall 2018 - Elizabeth McNamee

---



Does this sound familiar? Your foundation is committed to evaluation, but it struggles to keep pace with meaningful reporting that drives accountability, learning and impact. Knowledge sharing is a mantra, but staff never has sufficient bandwidth. When the foundation's board sits down with staff, there is a mismatch of expectations about what the data can truly reveal about our impact.

Many funders struggle with these pitfalls. Even while philanthropy's commitment to evaluation and learning is increasing in terms of staff time and grant dollars,<sup>1</sup> these common barriers to effective evaluation and learning persist.

---

<sup>1</sup> Coffman, Julia; Beer, Tanya, Patrizi, Patricia; and Heid Thompson, Elizabeth (2013) "Benchmarking Evaluation in Foundations: Do We Know What We Are Doing?," *The Foundation Review*: Vol. 5: Iss. 2, Article 5.

This was the case for [The John R. Oishei Foundation](#), 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. Board members routinely ask staff to articulate the impact of grants in precise and preferably numeric terms. It's not uncommon for staff to devote hundreds of hours each year to reporting on grant outcomes. Despite its small staff of just ten team members, the Oishei Foundation has a dedicated person to oversee evaluation and learning. In 2008, a Knowledge Management Officer (KMO) position was created to assist with evaluation and reporting, a role that has since grown to include community research, strategic planning and data science.

The Oishei Foundation's challenge was not a lack of determination to practice effective evaluation. Quite the opposite. The challenge was that the intensity of the Oishei Foundation's desire to measure results, demonstrate efficacy, and implement best practices, while well-intentioned, had fueled overly-burdensome reporting processes, prompted a series of disconnected efforts to implement new evaluation tools, and sowed internal confusion (and some controversy) about what the Foundation is committed to with respect to evaluation. Staff found themselves spending an inordinate amount of time preparing reports, only to discover that the information did not satisfy the Board's desire to articulate the Foundation's impact. This left everyone, Board and staff,

overwhelmed and unsure about what evaluation and learning could and should mean at the Oishei Foundation.

*“We heard from our Board again and again that they want to understand and demonstrate our impact but we struggled as a staff to take a strategic approach to measurement, reporting and learning.” – Robert D. Gioia (President)*

Curtis Robbins, who has served as the KMO at the Oishei Foundation since 2010, decided a new approach was needed – one that built alignment among the staff (and with the Board) about the purpose of evaluation and charted a path forward for bringing the Foundation’s evaluation and learning work closer to best practice.

With the help of an external consultant, Robbins convened the entire staff of the Oishei Foundation to participate in an evaluation visioning session. A primary goal of the session was to draft an Evaluation Vision Statement along with supporting Core Principles – a short encapsulation of the values an organization has for evaluation and learning that signals how evaluation will be put into practice. In effect, the working session provided the opportunity for the Oishei Foundation to take a step back and ask “what do we care about and what are we committed to, when it comes to evaluation?” In so doing, the hope was to add clarity, focus and transparency to evaluation practices within and across the Foundation.

As part of this process, staff looked to the field of philanthropy and to peer organizations. Publications by [FSG](#),<sup>2</sup> the [Oak Foundation](#),<sup>3</sup> and the [Stanford Social](#)

[Innovation Review](#)<sup>4</sup> provided illumination that guided the Oishei Foundation. Staff also looked to sample Evaluation Vision Statements of other funders, including the [Walton Family Foundation](#) and the [Ewing Marion Kauffman Foundation](#).

In addition to creating a unified understanding of what evaluation means and how the Oishei Foundation will engage in evaluation activities, the visioning session produced another important outcome: staff used the Evaluation Vision Statement as a guidepost to prioritize among the many desired evaluation projects and create a logical sequence for tackling those imperatives.



*“It was exciting to discover that the team was actually pretty closely aligned in our values. There were some differences, of course. But this conversation allowed us for the first time to put shared values about evaluation, and our disagreements, out in the open.” – Curtis W. Robbins (KMO)*

Staff now has clear focus on two key evaluation initiatives that will help bring the Oishei Foundation closer into alignment with

---

<sup>2</sup> Preskill, Hallie; Mack, Katelyn (2013) “Building a Strategic Learning and Evaluation System for your Organization,” *FSG*

<sup>3</sup> Cascadia Consulting Group and the Oak Foundation (2016) “Planning for Monitoring, Learning and

---

Evaluation at Small- to Medium-Sized Foundations: A Review”

<sup>4</sup> Wales, Jane; Ubinas, Luis; Bannick, Matt and Hallstein, Eric; Rodin, Judith and MacPherson Nancy; Brest, Paul; and Canales, James and Rater, Kevin. “Advancing Evaluation Practices in Philanthropy,” *Stanford Social Innovation Review*

evaluation best practices. First, is to add transparency with its Board, its grantees and the field about its approach to evaluation. The Oishei Foundation will soon launch a section of its website dedicated to sharing its approach and what it is learning. We encourage you to visit our website ([www.oishei.org](http://www.oishei.org)) for resources that may be helpful to your organization if you are similarly seeking to enhance the strategic clarity of your evaluation efforts. In particular, you may find the research brief, *Evaluation in Philanthropy: Key Trends and Best Practices*, to be useful.

Up next, we will focus our efforts on “re-imagining” and right-sizing Oishei’s grant reporting process. The Core Principles for evaluation call for the Foundation to minimize the reporting burden on grantees while focusing on long-term outcomes and broader impacts on society. As was reported in the *Stanford Social Innovation Review*, the Hewlett Foundation recently undertook a similar right-sizing project of its own.<sup>5</sup> Staff at the Oishei Foundation is eager to learn from Hewlett, our community partners and our blog audience on how we may reimagine the grant reporting process with attention to increasing grantee engagement, improving learning opportunities, and decreasing the reporting burden on both grantees and staff.

---

<sup>5</sup> Stid, Daniel and Mirrack Galbete, Jilian (2017) “Streamlining a Foundation Initiative’s Grant Practices” *Stanford Social Innovation Review*.