



EVALUATION + DESIGN

PROGRAM DESIGN • EVALUATION DESIGN • INFORMATION DESIGN

evaluation 2016

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Best Practices + Adaptive Evaluation = Improved Grantmaking

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Today's Aims

1. Where did we start?
2. How did graphic design support the evaluation?
3. What were the key steps in designing the evaluation?
4. Where did we end up?
5. What have we learned?



Context: Where did we start?

A Foundation: Cal Wellness Goals

- 1 Address health needs of underserved
- 2 Support and strengthen nonprofit organizations
- 3 Encourage leaders who work to increase health and wellness
- 4 Inform policy makers and opinion leaders about health and wellness

A New Strategic Direction

Advancing Wellness | Promoting Equity, Advocacy and Access



A Grantmaking Program

Portfolio 1: Bridging the Gaps in Access and Quality Care

- Advancing Health Care Reform and the Affordable Care Act
- Strengthening Community Clinics and Safety-Net Partners
- Improving Oral Health Care for Low-Income Adults and Seniors
- Increasing Diversity in the Health Professions

Portfolio 2: Expanding education and employment pathways

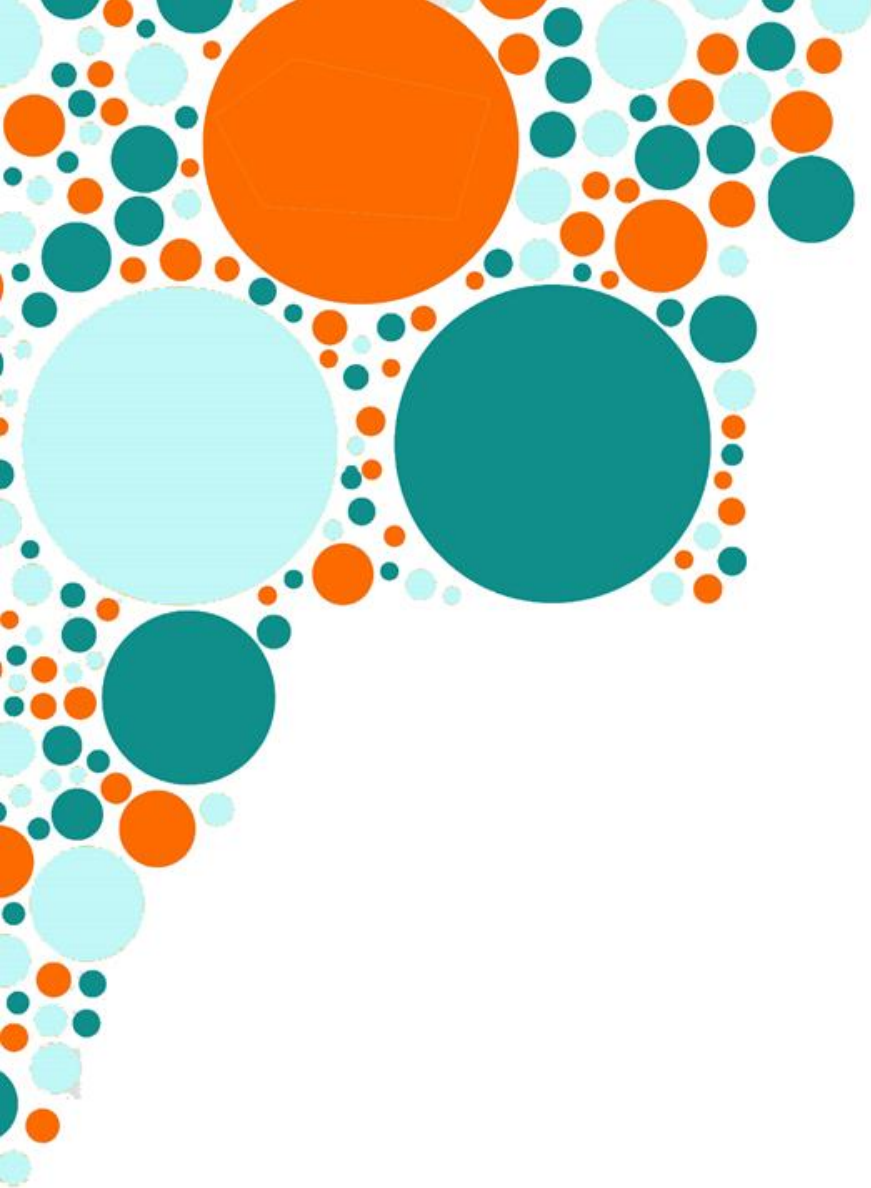
- Promoting Employment and Asset-Building Opportunities
- Increasing Educational Outcomes for Resilient Youth

Portfolio 3: Promoting Healthy and Safe Neighborhoods

- Fostering Healthy Environments
- Supporting Violence Prevention

Portfolio 4: Opportunity Funds

- Strengthening the Nonprofit and Philanthropic Sector
- Advancing Public Policy



What's the role of graphic design?

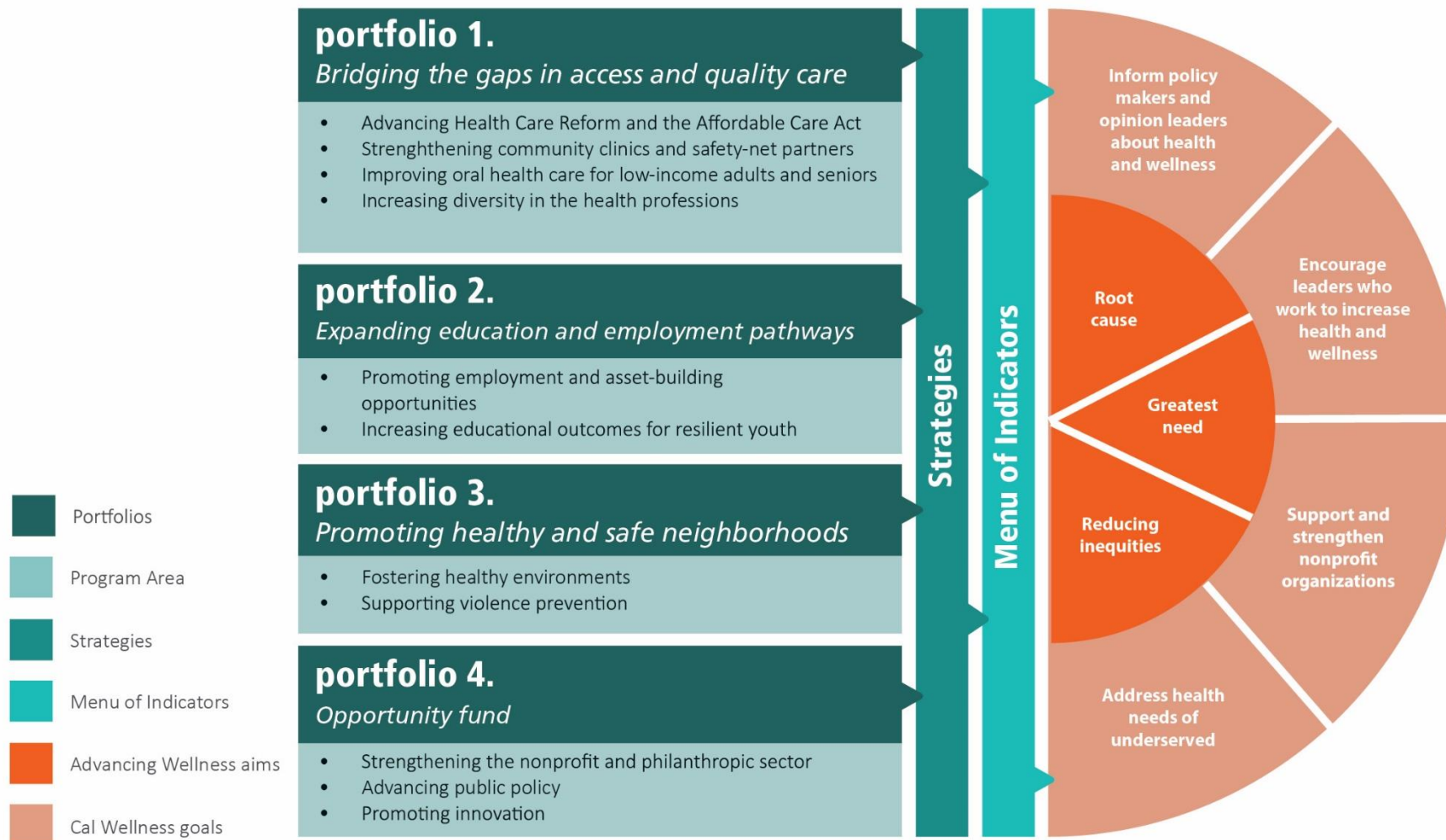
A Grantmaking Framework



An Aim: Advancing Wellness



A Visual: Advancing Wellness





**What were the key
steps in designing the
evaluation?**

A Plan



An Evaluation



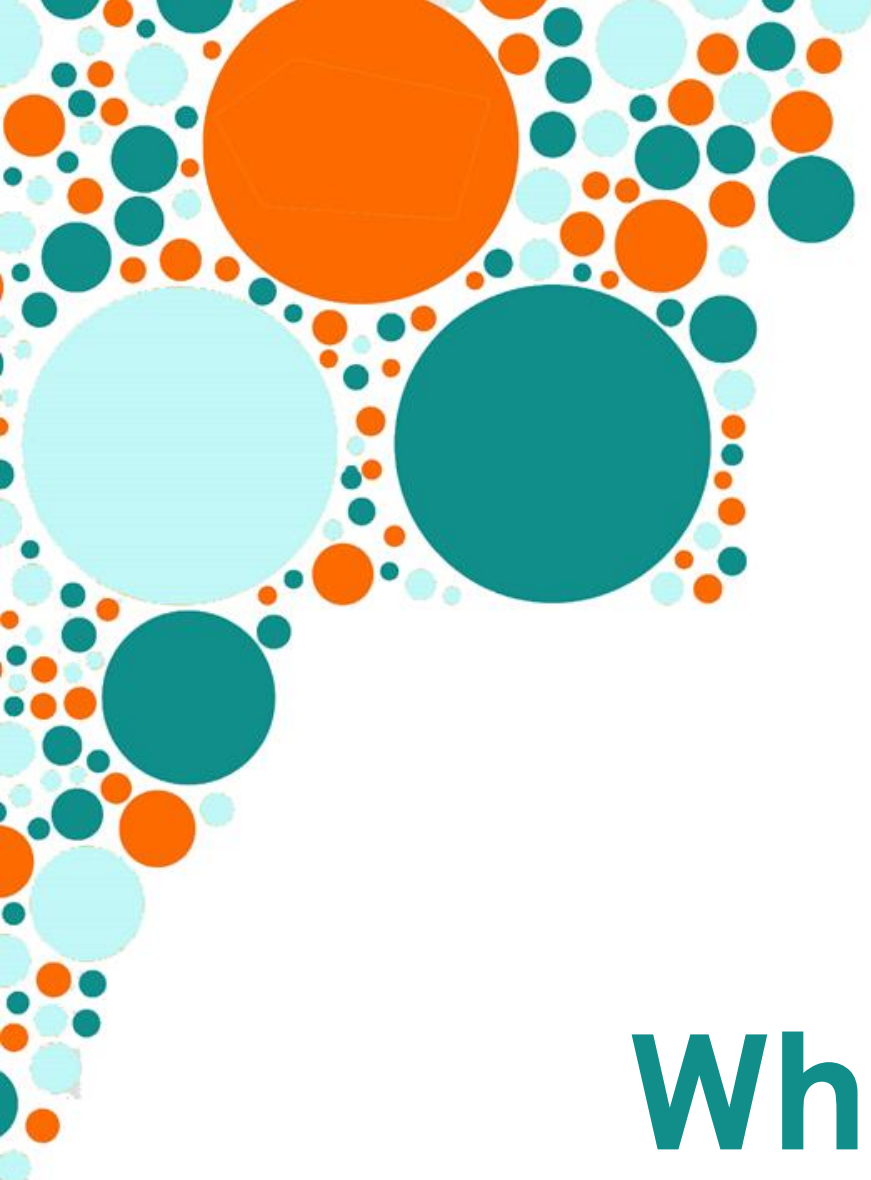
How do you
measure impact
and build in
ongoing learning?

A Goal: New Elements of Evaluation

OLD	NEW
Foundation-wide grantmaking goals	?
Retrospective-only approach	?
Individual grant evaluation through closeout reports	?
Internal Cluster Analysis	?

An Approach

- **Foundation Strengths and Best Practices:**
 - Valuing program director expertise
 - Limiting burden on grantees
 - Building strong relationships with grantees
- **Learning and Adaptation:**
 - Formalizing ongoing learning and adaptation



Where did we end up?

A Process: Adaptive Evaluation



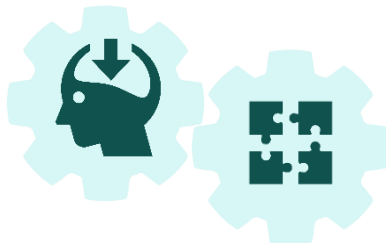
Identify. Determine grantmaking strategies and set up systems to track effects of funding.



Test. Award grants to organizations.



Document. Document results from the funding.



Learn + Adapt. Reflect and learn from the data and adapt future strategies.

Grantmaking and Organizational Learning

Evaluation Questions

- *Grantmaking:*
 - How is Cal Wellness **advancing health equity** in California in each of the four priority areas?
- *Organizational Learning:*
 - **What can be learned** from the roll-out of the 2015-2024 Strategic Plan?
 - **Is Cal Wellness getting the information needed** to make grantmaking decisions and course adjustments?

Adaptive Evaluation Questions

A background image showing two men in a professional setting. One man, on the left, is wearing a light-colored shirt and is looking down at something in his hands. The other man, on the right, is wearing a patterned shirt and is looking towards the first man. The image is semi-transparent, allowing the text to be overlaid.

What works?

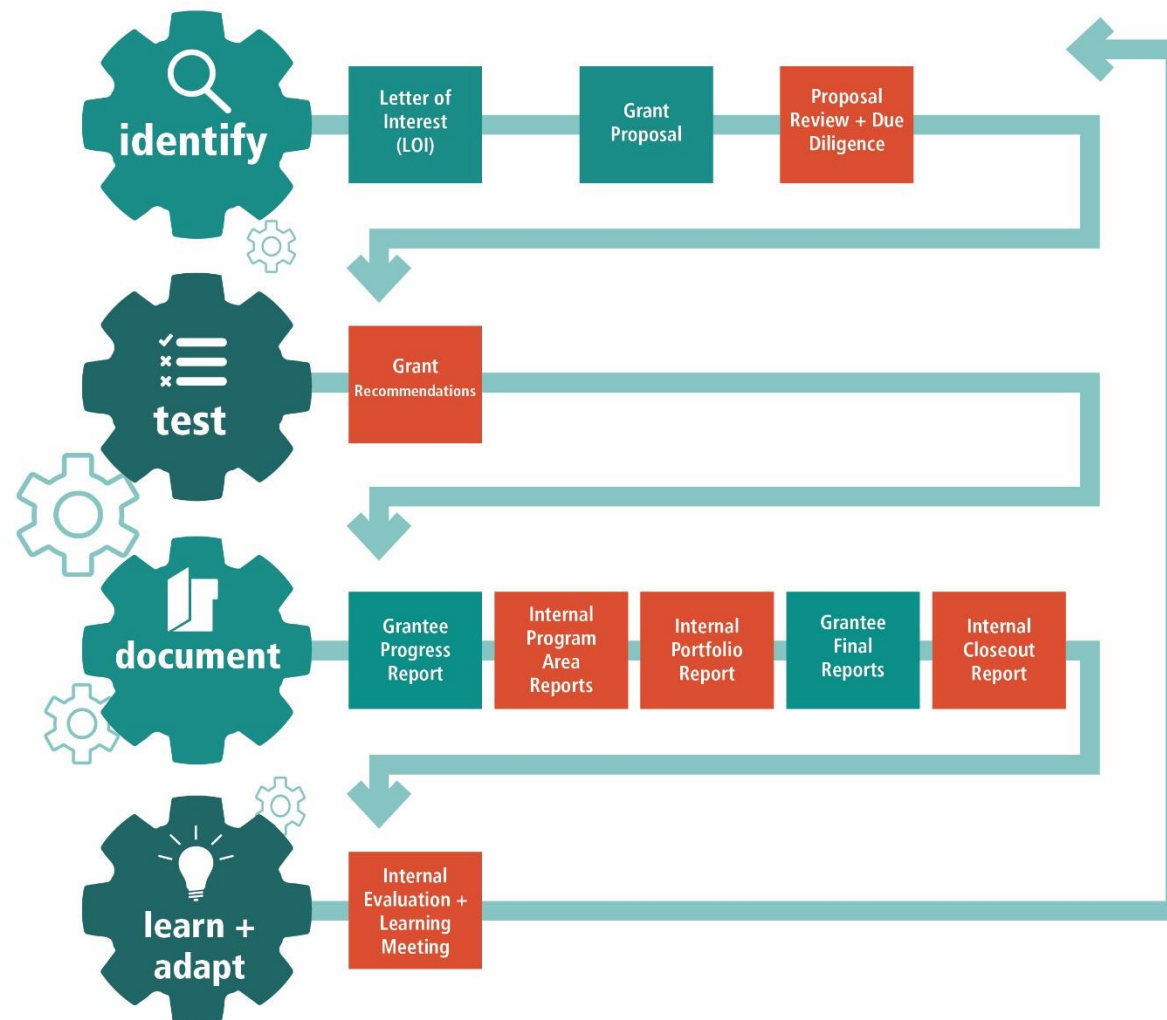
Who does it work for? **Where does it work?**

Where is the innovation?

Why does it work?

What are the effects?

An Evaluation Framework: Visualizing the Evaluation Approach



A Tool: The Equity Screen

- To standardize the grantee selection process

Considerations for Grantee Selection

* Equity Screen



Geographic diversity *



Racial/ethnic diversity, cultural appropriateness *



Serving low-income populations *



Serving the underserved *



Strategy is aligned with broad foundation goals*



Organizational viability



Range of strategies

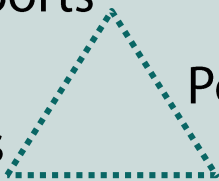


Cornerstone organization/track record of success



Financial health

A Goal: New Elements of Evaluation

OLD	NEW
Foundation goals	<ul style="list-style-type: none">• Foundation goals• Grantmaking goals by each program• Evaluation Framework to guide learning
Retrospective-only approach	Ongoing learning and course corrections
Individual grant evaluation through closeout reports	<div>Program Reports</div> <div>Grantee Reports</div> <div>Portfolio Reports</div> 
Internal Cluster Analysis	<ul style="list-style-type: none">• Internal Cluster Analysis• Internal Evaluation and Learning Meetings

Takeaways

- Build in time for:
 - **staff training** for evaluation
 - **tool development**
 - **database development** to align with new plan
- Establish a strong relationship between foundation/consultant
- Use **graphic design** to operationalize the framework
- **Balance** long-term evaluation and shorter-term focus
- Develop a **multi-pronged approach** to tracking equity

Turn and Talk

- ❖ Question #1: **How have you incorporated organizational learning into your evaluation approach?**
- ❖ Question #2: **What is the role of evaluation in shaping strategy (organizational, departmental, grantmaking approach)? How has your role as an evaluator helped in this process?**



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STAY IN TOUCH!