American Evaluation Association Conference - November 2015

**Integrating Evaluation & Learning in Foundations**

**Amidst Organizational Changes**

**Shared Context**

* Foundation focus: health; underserved populations; focus on California
* Organizational changes: new leadership; strategic planning; staff changes

**The California Wellness Foundation**

* **Identify:** Determine grantmaking strategies; set up systems to track effects of funding.
* **Test:** Award grants to organizations.
* **Document:** Document what resulted from the funding.
* **Learn:** Reflect and learn from the data.
* **Adapt:** Take the learnings and adapt future strategies.



**California HealthCare Foundation - Shifts in Evaluation & Learning**

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|  | **Before** | **After** | **How** |
| What? | Grants & Projects | Strategy | Focus and prioritize evaluation efforts.* Initiatives: outcomes
* Grants: process measures and outputs
 |
| When? | Retrospective | Ongoing | Establish metrics at the beginning of initiatives. Use to track progress and identify course corrections in an ongoing way.  |
| Who? | Narrow audience (internal) | Broader audience(internal) | Re-frame Results Reports as reflective, rather than descriptive, exercise. |
| How? | One-size-fits-all | Flexible & tailored | Allow flexibility in Results Report format. |

**Insights**

* It’s about the thinking…not the numbers
* Audience, audience, audience
* Ongoing process
* Collaboration across departments
* Intersection of framework and process

**For more information**

AEA eLibrary: <http://bit.ly/1MyRiSC>

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