

# Innovating Evaluation in Philanthropy

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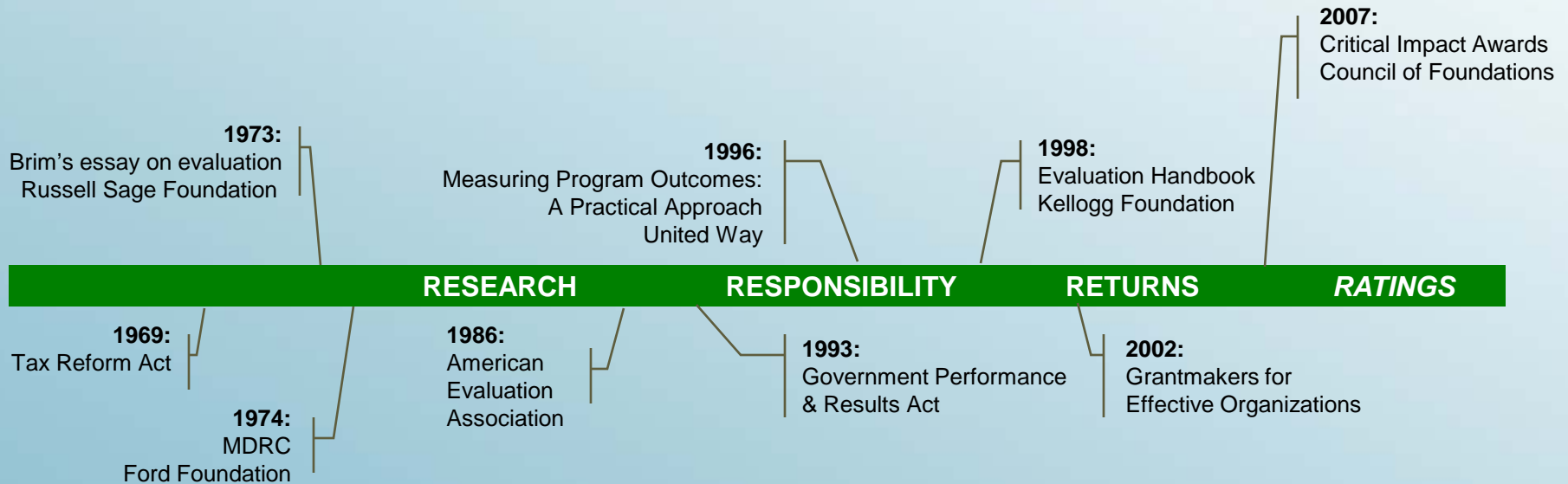
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# Innovation

- A new way of doing something. Incremental or radical change in thinking, products, process, or organization.
- A new good or product, method, market, source, organization or industry.
- Social entrepreneur: one who has created and leads an organization aimed at creating large scale, lasting, systemic change through the introduction of new ideas, methodologies, and attitudes.

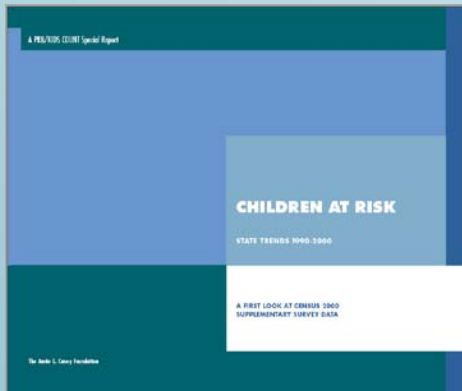
# A Brief History

Evaluation's presence in philanthropy has a history marked by laws, formalized associations, and publications.

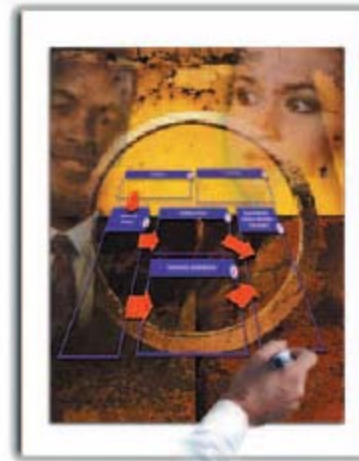




## Cleveland School Survey – 1917 The Cleveland Foundation



## Kids Count - 1997 Annie E. Casey



## W.K. Kellogg Foundation Logic Model Development Guide

## Logic Model Guide - 1998 W.K. Kellogg

## RWJF PERFORMANCE INDICATORS — JULY 2003

### Guide to Indicators Template

#### INDICATORS TO BE TRACKED

**Strategic Objective or Purpose:** Each portfolio or strategic team first briefly outlines its objective or purpose.

**Current Context for Our Work:** Then, a quick overview of problems being addressed and current environmental factors affecting strategies are presented.

**Strategy in Brief:** A brief strategy statement outlines the logic behind adjacent short-term, intermediate and long-term indicators.

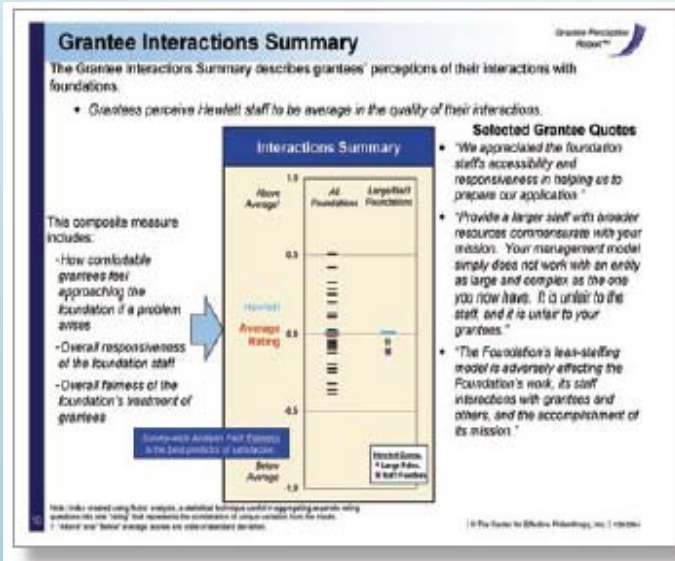
**Target Budget Plan:** To give some sense of the current and aggregate levels of investment envisioned, 2003 and multi-year budget estimates are included, as well as the level of past spending.

Short-Term Indicators (Over next 12 months)	Control	Target Date	Current Baseline/Status	Target
Short-Term Indicators are benchmarks designed to annual checks on progress that we hope will help clarify our more immediate plans and strategies. These are critical elements of leading strategies in completion of activities related to staff work in your program. Each has a target that is either measured by a numerical outcome, a "yes/no," or, in the case of activity indicators, a "completed/not completed" assessment. We developed every such indicator to be internal use, a key indicator of those in progress in the package.				

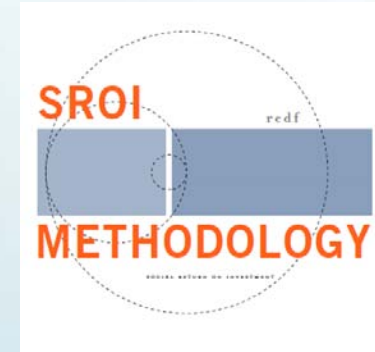
Intermediate Indicators (12-18 months)	Control	Target Date	Current Baseline/Status	Target
Intermediate Indicators are those measures that the team plans to meet in 12-18 months, which some activity measures are included. There are other more outcome measures that extend longer-range accomplishments. Indirect indicators provide a mid-term sense of progress as well as help test the site of our short-term tactics (especially, if these interim measures are not moving over time, we need to refine our short-term plans).			The data we report to the target	What we are aiming for

Long-Term Indicators (+24 months)	Control	Target Date	Current Baseline/Status	Target
Long-Term Indicators span the months. There are generally more "outcome" measures closer to our desired outcomes that also provide a check on overall strategies.				

## Impact Framework - 2003 Robert Wood Johnson



**Grantee Perception Report - 2001  
Center for Effective Philanthropy**



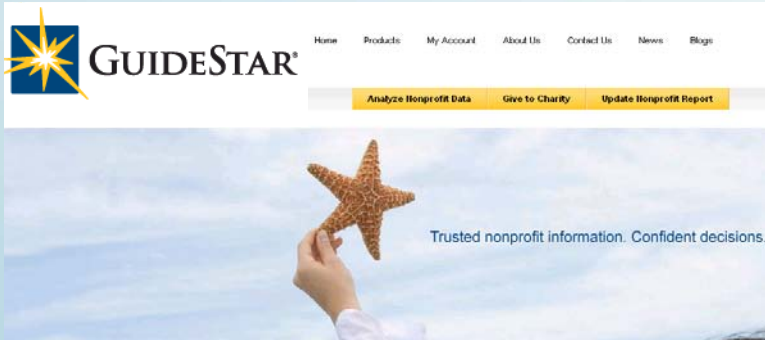
**Social Return on Investment  
Roberts Enterprise Development Fund**



**Mission Related Investing - 1997  
F.B. Heron Foundation**



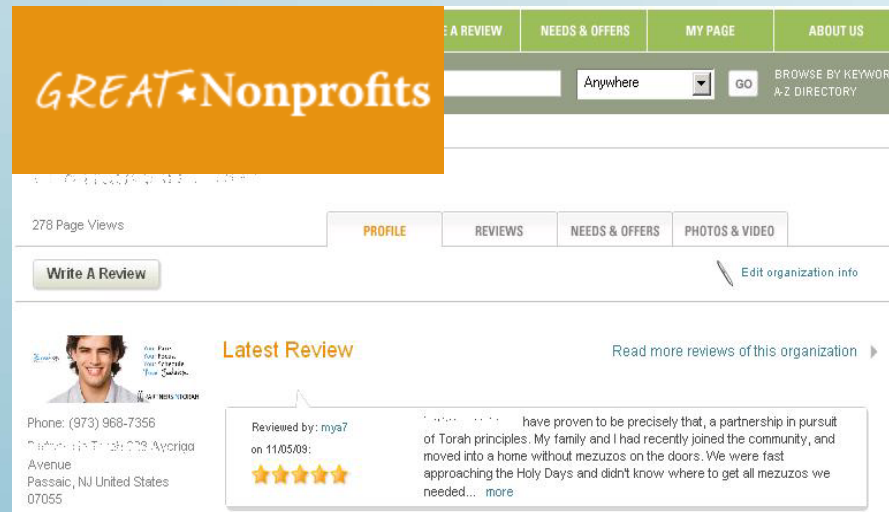
**Mission Driven Investing - 2007  
W.K. Kellogg Foundation**



GuideStar - 1994



Charity Navigator - 2001



Great Nonprofits - 2007

# Evaluands, Products, and Structures

- The Evaluand
  - a project, organization, sector, system
  - a grant, cluster/initiative, program area, foundation
  - strategies: advocacy to organizational effectiveness
  - program outcomes, implementation, interactions with funders
- Products
  - reports, dashboards, ratings on internet, the process itself
- Evaluation structures
  - organizational charts
  - titles



# Future Possibilities

- Technology & Data Systems
  - Making data or opinions more transparent...risks?
  - Facilitating the tracking and linking of data
  - Example: educational (access, delivery, instruction, assessment)
- Globalization of Philanthropy
  - Emerging regions
- Utilization of Evaluation for Social Change
  - Social networks: acquisition, engagement, and use of research
  - Social media



# Questions

- What innovations can aid collection of meaningful data on program outcomes? Aid analysis? Facilitate communications and use?
- What products, processes, and structures will emerging philanthropic markets adopt?
- Does the world care about the performance of foundations? Really?

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