



#eval2016

@harderco

Designed for Learning

Engaging Funders and Grantees in Pursuit
of Meaningful Measures



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research

About Us

Weingart Foundation aims to advance social and economic equity through support to nonprofit organizations working to provide greater access, resources, and opportunities in low-income communities throughout Southern California.



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Director of Learning,
Weingart Foundation

Harder+Company Community Research works with public- and social-sector organizations to learn about their impact and sharpen their strategies to advance social change.



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Learning Objectives

At the end of this session, you will be able to...

- Describe what it takes to **support funders** with designing a learning and assessment system aligned with their values
- Articulate strategies for meaningfully **engaging grantees** in the design process
- Understand **what makes these learning tools useful** for grantees as well as for funders

Overview

- Background
- Our design process
- The Learning & Assessment system
- Lessons learned and insights
- Questions and discussion

Mission Statement

To build a better Southern California by supporting nonprofit organizations to more effectively serve the underserved.

To achieve this mission, the Foundation provides grants and other support designed to **improve the capacity and effectiveness** of nonprofit organizations delivering quality services in the areas of



health,



human services, and



education

for people and communities in need.



Impact Goal

Grantees will have a greater capacity to benefit low-income and underserved individuals and communities.

Measured by percent of grantees...



Making meaningful progress towards organization goals



Increasing or maintaining core programs/services



Strengthening organizational effectiveness



Strengthening or maintaining financial position

The Challenge

In an environment that is crowded with generic organizational effectiveness assessment tools and frameworks, how can we design a **rigorous** learning and assessment system that reflects a funder's **values** and **resonates** with both the foundation and its grantees?

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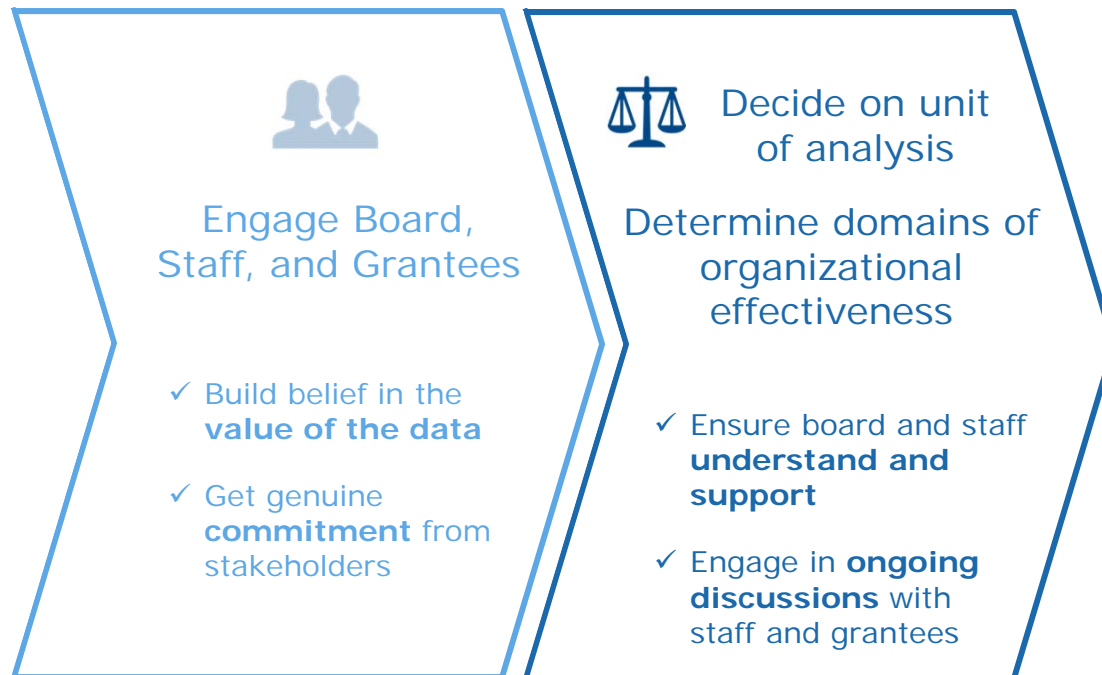
Step 1: Gaining Support



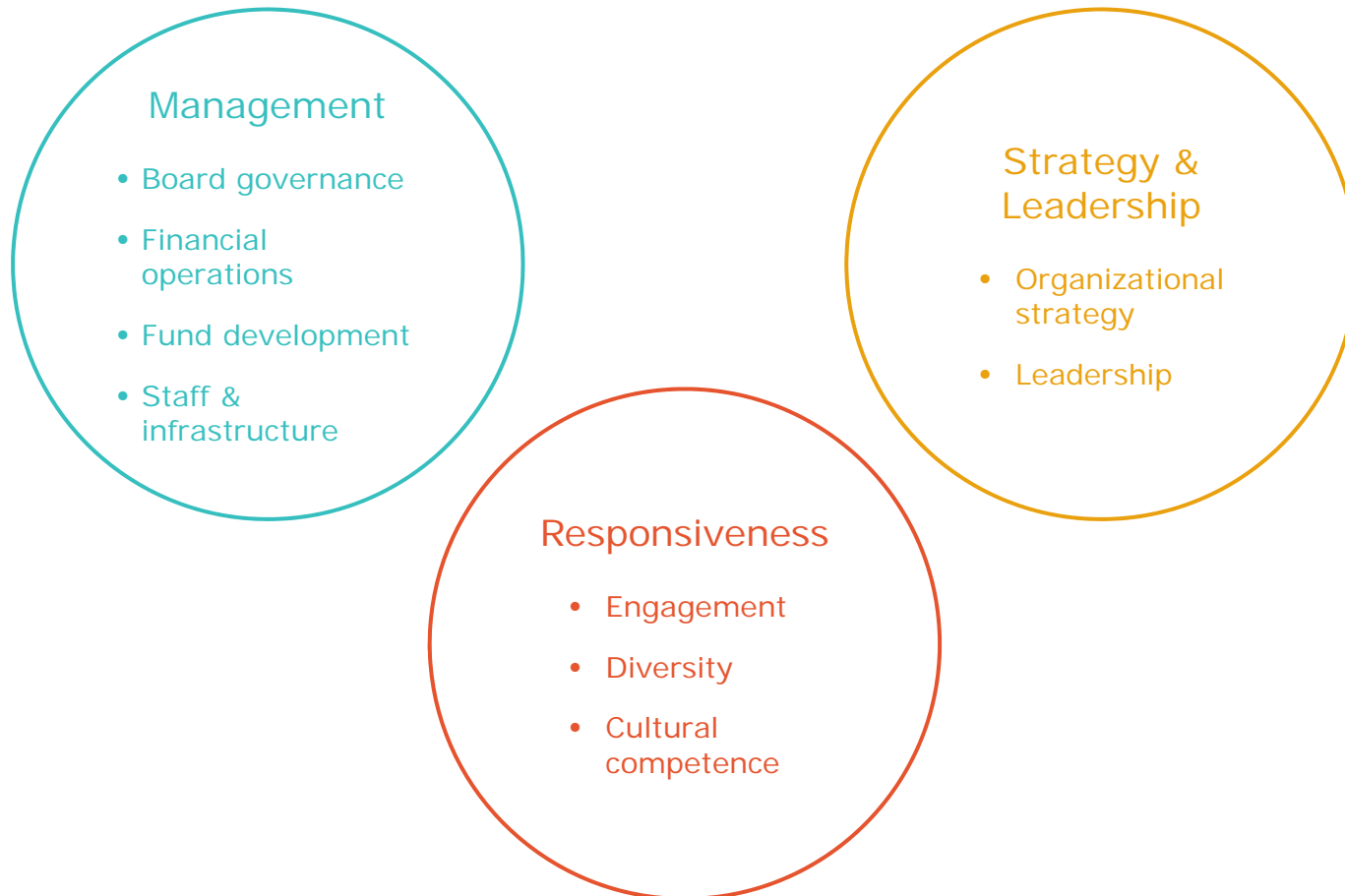
Engage Board,
Staff, and Grantees

- ✓ Build belief in the **value of the data**
- ✓ Get genuine **commitment** from stakeholders

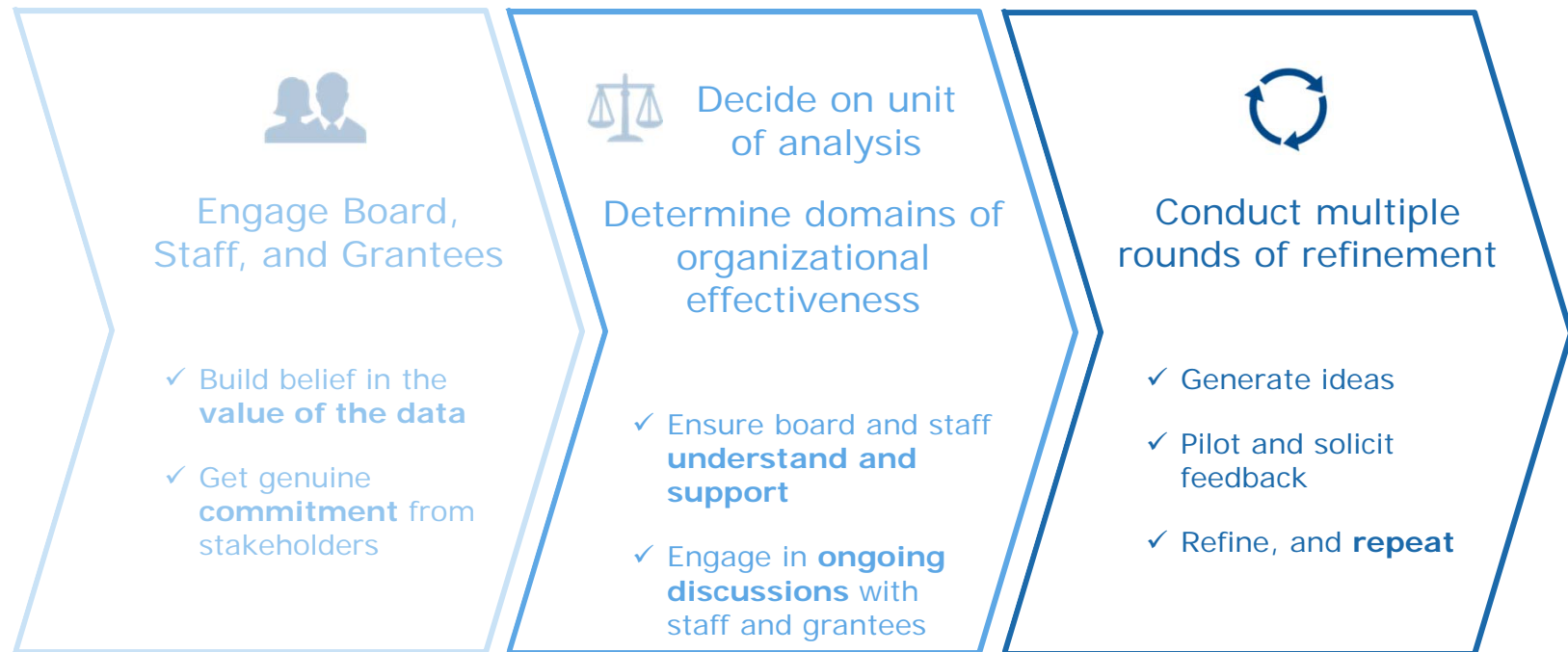
Step 2: Understanding Priorities



9 Domains of Organizational Effectiveness



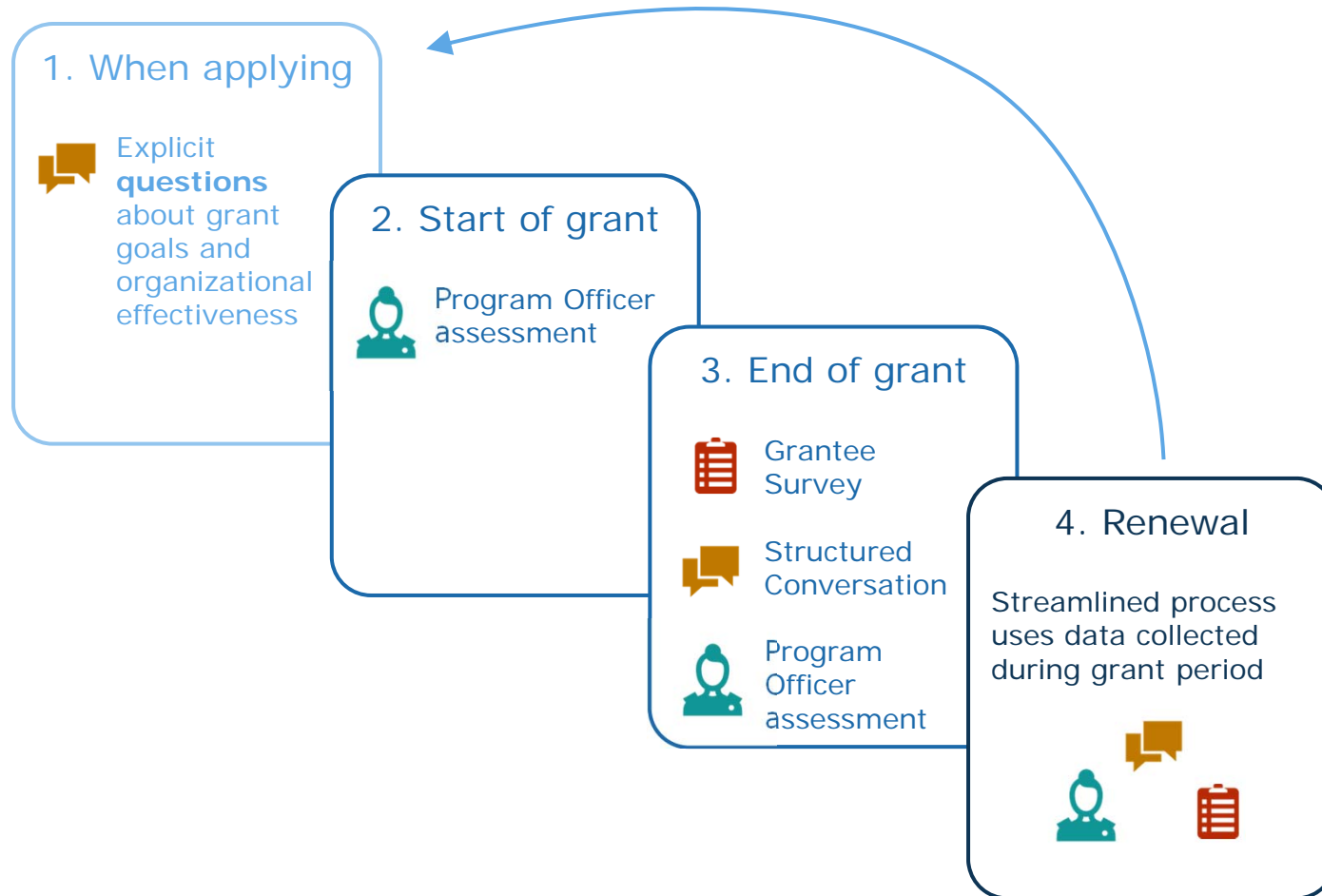
Step 3: Refining the System



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Learning & Assessment Grant Cycle



Part 1. Program Officer Assessment



Financial Operations and Management	Current Capacity								Comments
	1		3		5		7	N/A	
Financial reporting: Regularly tracks and reports financial activities to be reviewed, managed, and approved by board and staff leadership.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Cash flow: Has access to loans, reserves, and/or working capital to manage cash flow.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Full cost of services: Has systems and processes in place to understand the full cost of services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Overall financial operations: Financial operations are carried out in alignment with budgeting, decision-making, and organizational goals.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Additional item (optional)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Part 2. Grantee Survey



Financial Operations and Management	Always	Often	Sometimes	Rarely	Never	N/A
a. We track and report financial activities to board and staff management.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
b. Key staff and board members review regular updates on our organization's financial health.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
c. We have access to loans, reserves, and/or working capital to manage cash flow (e.g., to make payroll).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
d. Financial operations are carried out in alignment with budgeting, decision-making, and organizational goals.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
e. We have written systems and controls that govern financial operations.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
f. Overall, how would you rate your organization's capacity in the area of FINANCIAL OPERATIONS AND MANAGEMENT?						
<input type="checkbox"/> 1 – We have a clear need for increased capacity in this area <input type="checkbox"/> 2 – We are getting by in this area, and there is some room for improvement <input type="checkbox"/> 3 – We are functioning well in this area <input type="checkbox"/> 4 – We go above and beyond the items listed here <input type="checkbox"/> N/A (not a key functional area for our organization at this time)						
g. Overall, to what extent did your grant from the Weingart Foundation impact your organization's capacity in the area of FINANCIAL OPERATIONS AND MANAGEMENT?						
<input type="checkbox"/> Large impact <input type="checkbox"/> Moderate impact <input type="checkbox"/> Little to no impact <input type="checkbox"/> N/A (not a focus during grant period)						

Part 3. Structured Conversations



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What Worked Well

Our process included:

- Funder and evaluator co-creation
- Iterative and inclusive design
- Stakeholder engagement

The **tools** take into account that:

- Change takes time
- Grant goals can and should change
- Community responsiveness matters

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Resources & Contact

<http://www.weingartfnd.org/Learning-and-Assessment>

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