**2011 EEN Forum Notes**

**Session Name: Process Complexity and Evaluation Utility**

**What Influences the Influence of an Evaluation?**

**Speakers:** Andrew Johnson, William Penn Foundation

Helen Davis Picher, William Penn Foundation

Peter Szabo, Bloomingdale Management Advisors

**Session Date/Time:** 6/24/2010 11:00 AM

**Notetaker**: Laura Rothlisberger

**Main Themes**:

* How to navigate an evaluation so that it is used by decision-makers and program staff.
* Elements that can make an evaluation successful.

**Detailed Notes**:

* Hypothesis: The action cycle of a program is (1) strategy, (2) program, and (3) evaluation. The evaluation should lead back into redefining the next strategy. However, there is often disconnect there. Problem is when evaluation is conducted but it does not inform strategy.
* Key actors in an evaluation include: (1) sponsor of the evaluation, (2) client/program staff, (3) consultant/evaluator, (4) subject/grantees.
* There are dynamics that arise among these key actors and their relationship. These concerns may inhibit data sharing, information sharing, etc., and distort an evaluation.
* Case study from the William Penn Foundation (WPF). The WPF is a private, family foundation created in 1945. They have an annual grantmaking budget of $80 million. Focus on Greater Philadelphia region. In their 2001 Strategic Plan they began focusing on new goals in three program areas. This new plan caused a systems change and new focus strategy. They developed an evaluation strategy.
* Environmental and Communities – one of the funding priorities is to protect and conserve significant regional landscapes. They identified land trusts and gave grants to those trusts.
* They wanted to have measurable, observable impact of those grants. From 2003-2005, they gave 22 grants to 14 organizations.
* Major findings in the Evaluation: Capital was too diffused to have long-term impact. Administration very cumbersome.
* Key responses to the evaluation:
  + Narrowed geographic focus.
  + Engaged intermediary for capital delivery. Made a 3-year grant to have an intermediary do the due diligence and track the impact and progress.
* Why was WPF able to make the change in this program after the evaluation? Why was the evaluation influential?
  + Culture in Foundation. Link between strategy and evaluation. Evaluation is a focus of the strategic plan. They are conducting evaluations of system changes.
  + Clarity. Foundation knew what they wanted from the evaluation. Best practice is to determine and write out the evaluation questions from the outset.
  + Communication. Good, honest, frequent communication throughout the evaluation.