Let's Consider Evaluation

A Self-Assessment Tool for Foundation Trustees

1

WHAT'S YOUR TAKE ON EVALUATION?

What purposes does it serve? How should it be used by the board? How much should it cost? Many of the foundation trustees interviewed by FSG Social Impact Advisors said evaluation was important, but their points of view on why and how to use it ranged widely.

This survey is designed to capture individual trustee and CEO perspectives and inform a board discussion that can enhance the use of evaluation as a tool for organizational learning and improved performance at your foundation. In the three sections that follow, please rate your level of agreement with each statement.

I. PURPOSE: WHY SHOULD WE EVALUATE?				
For Better Planning...	NOT IMPORTANT			VERY IMPORTANT
1. Help us plan clear and **measurable program outcomes** before we begin making grants	1	2	3	4
2. Enable **program staff** to make more informed decisions	1	2	3	4
3. Enable the **board** to make more informed decisions	1	2	3	4
4. Test our **theory of change**	1	2	3	4
For Improved Implementation...	NOT IMPORTANT			VERY IMPORTANT
5. Fulfill our **fiduciary duty** to ensure the foundation's resources are used effectively	1	2	3	4
6. Understand how **multiple grants** work together	1	2	3	4
7. Improve our implementation through **midcourse corrections** in grant programs	1	2	3	4
8. Help us identify the most **effective grantees**	1	2	3	4
9. Help **grantees learn** and improve their work	1	2	3	4
10. Hold **grantees accountable** for their use of grant money	1	2	3	4
For Tracking Progress...	NOT IMPORTANT			VERY IMPORTANT
11. Assess the **effectiveness of our program strategies**	1	2	3	4
12. Show the outcomes of **individual grants**	1	2	3	4
13. Demonstrate the **foundation's overall impact**	1	2	3	4
14. Track **key indicators** of progress toward our goals	1	2	3	4
15. **Persuade others** to join or replicate our successful initiatives	1	2	3	4
16. Safeguard the foundation's **reputation**	1	2	3	4
17. **Additional comments** on purposes of evaluation:				

II. METHOD: HOW SHOULD WE EVALUATE?

What Evaluation Data Should Look Like...

	STRONGLY DISAGREE			STRONGLY AGREE
18. Compiled from **many different sources**, formal and informal, throughout the duration of the grant program	1	2	3	4
19. A rigorous **social science study** that compares outcomes against a control group	1	2	3	4
20. **Qualitative and anecdotal** information to describe the experiences of those affected by our funding	1	2	3	4
21. **Quantitative** measurements providing hard numbers about the outcomes of our funding	1	2	3	4
22. Limited to the results that can be **attributed to our own funding**	1	2	3	4
23. **A participatory process** that engages grantees and funders in mutual learning	1	2	3	4

We Should Use Evaluation Findings to...

	STRONGLY DISAGREE			STRONGLY AGREE
24. Decide whether or not to **renew grant support**	1	2	3	4
25. Evaluate **staff performance**	1	2	3	4
26. **Shift resources away from programs** with limited results to those with a higher potential	1	2	3	4
27. **Share positive evaluation results** with the field to encourage others to follow our lead	1	2	3	4
28. **Share negative evaluation results** with the field to prevent ineffective use of resources	1	2	3	4

Our Process for Using Evaluation at the Foundation Today...

	STRONGLY DISAGREE			STRONGLY AGREE
29. **Serves the purposes I identified** as most important in Section I	1	2	3	4
30. Provides information in a format that is **easy for me to use and understand**	1	2	3	4
31. Is timely and useful for the **board's grantmaking decisions**	1	2	3	4
32. Is timely and useful for the board's broader direction-setting and **strategic decisions**	1	2	3	4
33. Fosters a culture where **staff is comfortable sharing good and bad news** with trustees	1	2	3	4
34. Enables us to **improve our effectiveness** over time	1	2	3	4

35. **Additional comments** on methods of evaluation:

III. COST: HOW MUCH SHOULD WE INVEST IN EVALUATION?

I Think We Should...

	STRONGLY DISAGREE			STRONGLY AGREE
36. Reserve a **larger percentage** of the foundation budget for evaluation	1	2	3	4
37. Allocate **more staff time** to analyzing and interpreting the results of past grants in order to improve future grantmaking recommendations	1	2	3	4
38. Allocate **more board time** to discuss evaluation results in order to make better informed decisions	1	2	3	4
39. Provide **more capacity building** funds for our grantees to develop better performance measurement processes	1	2	3	4

40. **Additional comments** on cost of evaluation:

To learn more or download an electronic version of this survey,
please visit www.fsg-impact.org/ideas/item/trustee_evaluation_tools.html